

DonorShops.com User Manual

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Introduction

About DonorShops.com

The DonorShops.com eCommerce platform provides complete integration with SofterWare DonorPerfect Online (DPO) using the DonorPerfect Application Programming Interface (API).

For a list of which features are included in each version of DonorShops (LITE, PRO, UNLIMITED), please see: <http://donorshops.com/pricing.php>

Audience

This User Manual supports version V.LIVE_14-06-16 of the DonorShops.com eCommerce platform and explains how to use the various features provided in this application. It has been written primarily for the users of the JPanel administration interface.

This update includes /settings functionality.

A Note to the Reader

DonorShops.com is founded on the principles of excellence and integrity. This manual is being updated to make it even more useful to you. We would be happy to receive any comments and/or suggestions you might have.

- Please submit comments, questions and suggestions via the DonorShops Service Request Portal at <http://support.donorshops.com>

Summary of changes in this version

- Misc. tune-ups
- Addition of Renotify Customer function
- Abandoned Carts report enhancement
- Additional Abandoned Carts enhancement to allow filtering of viewed entries by type
- Description of product screen inventory management enhancement (see Products > Stock & Price Variants > Inventory Update Enhancement section)

First Steps

Planning Ahead: Pre Site Activation

Before your DonorShops.com site is activated, you will want to have the content for your site ready so that you can get it up and running as quickly as possible. This includes:

Item	Notes
Organizational Logo	We will need a copy of your organizational logo in JPG/JPEG, AI (Adobe Illustrator), or PNG (with transparency) format for your DonorShops site.
DonorPerfect Online Username & Password	In order to connect your DonorShops site to your DPO system, we will need a DPO User ID and password. We recommend that you create a separate User ID and password for DonorShops. This user is created in DPO via Settings > User Security then click the Add New Named User button. We recommend using a username and password that is secure. Example.; User: r4k56imgbaab003ajf8mn34k5h Pwd: 4mjlo689dnk4l6j6jmt4ll6n45itmr4 ... not these actual values, but something nobody is going to guess at.
SafeSave Gateway Username & Password	Your DonorShops site also uses a SafeSave username and password to process financial transactions. If you aren't sure what this is, DonorShops can set this for you as part of the initial site setup PLEASE NOTE: If you are a new DonorPerfect Online client, we recommend you take the time now to make sure your SafeSave gateway and payment processor accounts have been submitted to DonorPerfect as these can take several weeks to process. You will need these in place in order to process financial transactions on your DonorShops site. We recommend using a username and password that is secure. Example.; User: r4k56imgbaab003ajf8mn34k5h Pwd: 4mjlo689dnk4l6j6jmt4ll6n45itmr4 ... not these actual values, but something nobody is going to guess at.
Facebook Admin ID	This website will tell you what this number is: http://findmyfacebookid.com
Twitter Account	If your organization has a twitter account, please provide us with your twitter user name.
Images	We strongly recommend you save your images with 70 percent quality. The image quality setting in image processing software refers to the amount of compression applied to an image (not the dpi). The image quality will appear to be the same as an uncompressed image, but the images will load much faster (up to 20 times faster) so your DonorShops site will load much more quickly for your visitors.

Front page banner images	You can have as many as you like – the system will switch between them in the order you specify. All banner images must be 950 x 400 JPG image files.
Category images	Category Images are disabled by default, but you can have a different image for each category in your site. You can enable / disable category images in your DonorShops JPanel > Advanced Settings screen. All category images must be 950 x 330 JPG image files.
Product images	You will want an image representing each product that will appear on your site. The size is flexible, but if you make the image files too small, they will tend to pixelate and not look great. You can use 400 x 600 as a rough guideline for your JPG product images, but you have a lot of flexibility here as the system will resize the images automatically.
DPO GL Codes, Solicitation Codes, Sub-Solicitation Codes, Campaign Codes	Before your site is activated, you may want to think about how you are going to use these DPO fields to help you track DonorShops orders.

Site Activation

When your site is initially activated, it will still have a default generic 'look' but will allow you to log in and begin setting up your

- Banner Images
- Product Categories
- Products
- Pages
- Blogs

... while we do your DonorShops Shop Theme Setup to give your DonorShops YOUR look!

Resources

The primary support resources for DonorShops are

- The DonorShops User Manual
- Our Service Request Portal at <http://support.donorshops.com>.

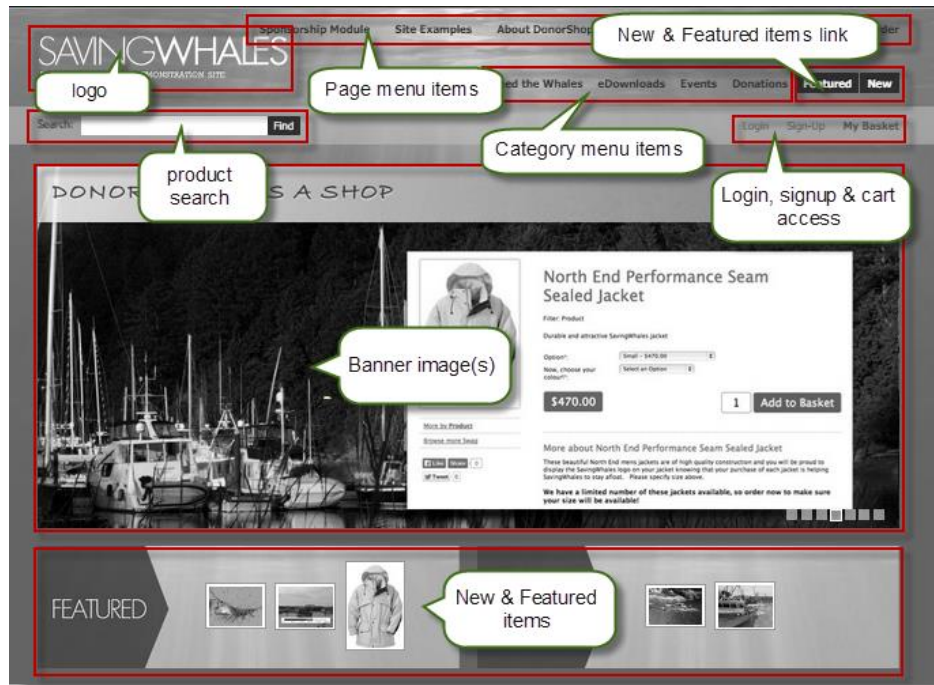
You can access the Service Request Portal either directly via the above link or through your DonorShops JPanel interface by clicking the HELP menu item:



The Interface

Customer Interface

The image below shows the arrangement of elements on your DonorShops site home page:



See this interface online at: <http://demo.donorshops.com>

Administrative Interface

The **JPanel** interface is where you will administer your DonorShops.com eCommerce platform.

Terry Poplette
[Edit](#) - [Logout](#)

 **Content**
[Manage/Edit Pages](#)
[+ Add Page](#)

 **Feeds**
[Home Page Banners](#)
[SavingWhales Blog](#)
[DonorShops Video Feed](#)
[+ Add Feed](#)

 **E-Commerce**
[Products](#)
[Product Categories](#)
[Promotions](#)
[Tax Rules](#)
[Shipping](#)
[Membership](#)
[Orders](#)

 **Files**
[Image Library](#)
[Downloads Library](#)

 **Site Design**
[Edit Layouts](#)
[Edit Buckets](#)
[Edit Style Sheet](#)
[Edit Java Script](#)

 **Administration**
[Members](#)

 [Add Page/Link](#)

 [Bronze Member Login Landing Page](#) HIDDEN FROM MENU <http://demo.donorshops.com/bronze-member-login-landing-page.php>

 [Basic Member Login Landing Page](#) HIDDEN FROM MENU <http://demo.donorshops.com/basic-member-login-landing-page.php>

 [Non Member Landing Page](#) HIDDEN FROM MENU <http://demo.donorshops.com/non-member-landing-page.php>

 [El Sal 2](#) OFFLINE <http://demo.donorshops.com/el-sal-2.php>

 [Sample Page](#) OFFLINE <http://demo.donorshops.com/sample-page.php>

 [Site Examples](#) <http://demo.donorshops.com/examples.php>

 [About DonorShops](#) <http://demo.donorshops.com/about-donorshops.php>

 [Content Management](#) <http://demo.donorshops.com/about-donorshops.com/content-management.php>

 [DPO Integration](#) <http://demo.donorshops.com/about-donorshops.com/dpo-integration.php>

 [A DonorShops Order in DPO](#) <http://demo.donorshops.com/about-donorshops.com/a-donorshops-order-in-dpo.php>

 [Contact Form](#) OFFLINE <http://demo.donorshops.com/about-donorshops.com/contact-form.php>

 [Video Content](#) OFFLINE <http://demo.donorshops.com/vid/index.php>

 [Calendar](#) <http://demo.donorshops.com/calendar.php>

 [SavingWhales Blog](#) <http://demo.donorshops.com/blog/index.php>

 [DonorShops Fact Sheet](#) <http://www.software.com/doclib/fact-sheet>

 [DonorShops Home](#) <http://donorshops.com>

 [Currency Exchange Rates](#) <http://demo.donorshops.com/currency-exchange-rates.php>

 [Misc Links](#) OFFLINE

 [A Non-product DonorShops Page](#) <http://pff.donorshops.com/a-non-product-donorshops-page.php>

 [True North Aid DonorShops Site](#) <http://truenorthaid.donorshops.com/true-north-aid-donorshops-site.php>

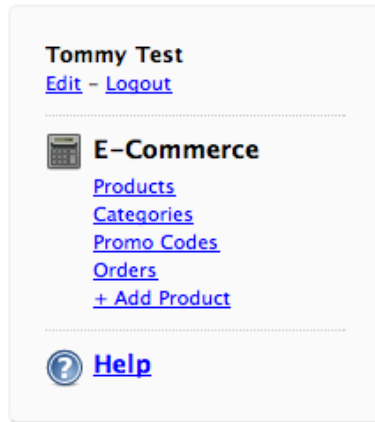
 [A DonorShops Product Page](#) <http://shopbpea.donorshops.com/a-donorshops-product-page.php>

 [Administration](#) <http://demo.donorshops.com/administration.php>

 [DonorPerfect Login](#) <http://demo.donorshops.com/donorperfect-login.php>

 [Information Request Form](#) <http://demo.donorshops.com/information-request-form.php>

Depending on the access level of your JPanel account, you may not see all the menu items shown. Your JPanel administrator (within your own non-profit organization) has the ability to change user account permissions. Your typical user menu will contain just these items:



Site Configuration Tips

We've included this section to give you some ideas on how to set up your DonorShops site so that it will really be irresistible to your supporters!

Item Descriptions and Blogging

When we designed DonorShops, our philosophy was to be the polar opposite to a virtual cash register. We wanted to create a tool that would allow you to **engage your supporters in your mission, your values and your activities**.

When you are building your product descriptions, you have the opportunity to do exactly this by

- Giving your DonorShops site visitors details about the work you are doing
- Show them pictures and video from the location(s) where you are working
- Have your staff talk about the people you are helping
- Show them the field where you are going to build the well
- Tell them when the truck is leaving with supplies

... you get the idea.

In the past, people would support organizations because they believed in the overall values and work of your organization. This is true less and less. People these days want specifics – they will rally to a cause that is going on right now.

Give them updates on your progress. The DonorShops blogging feature is a great way to give them day-by-day updates!

Images

On the front page of your DonorShops site, you will have one or more **banner images**:

Your **banner images** can be used to promote your organization but can ALSO be used to promote your product/donation/event items. Each banner image can be linked to a Page, Blog or Product item in your DonorShops site. Also, you can have as many banner images as you like, so make full use of this capability to advertise your projects and products!

REGARDING ALL IMAGES:

- For Banner and Category images, make sure you follow the requirements for image size and type listed in the Planning Ahead section of this document
- **For ALL images:** We HIGHLY recommend that when you are saving images for use in DonorShops that you adjust the Quality setting to 70 percent. This would, for example, reduce the file size of a banner image from 1MB down to 50kb (1/20th the size of the original) without making your images appear to have reduced quality. This file size reduction has direct and significant impact on how long it takes your DonorShops site to load – especially for your supporters with lower bandwidth connections.

Inserting Images/Video into Page Content

If you are inserting banner images or product images, there are already Choose File buttons there to upload image.

If, on the other hand, you are inserting an image into a Page Content window like this:



... then the procedure is slightly different.

- Upload the desired image into the Image Library (JPanel > Files > Image Library)
- Copy the link value
- Go to the desired page or product
- Click the small green tree icon (see menu picture above)
- Paste the link into the Insert/Edit Image popup window

If you are inserting video:

- Go to the desired location in the page content window
- Click the HTML link (see menu picture above)
- Paste the <iframe> code into the desired location
 - In YouTube, for example, you can copy the <iframe> code by locating the desired video, clicking Share and then choosing Embed. This will show you the <iframe> code for the video

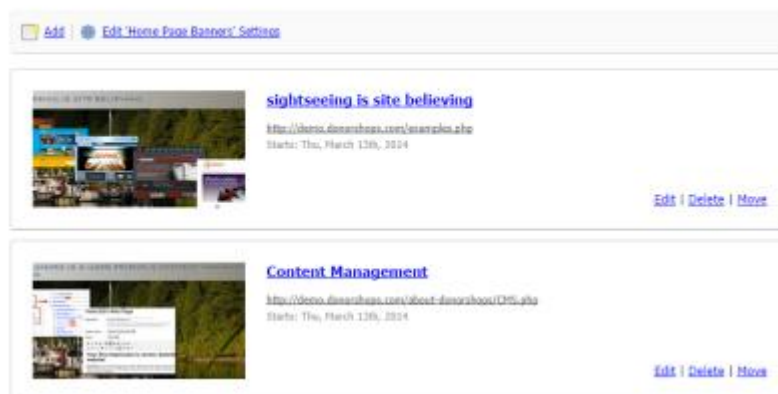
Featured Items & New Arrivals

Don't let your site get 'stale'. Changing Featured & New Items is as easy as clicking a check box in a Product Detail screen. Change these items frequently.

Banner Images

The banner images that appear on your DonorShops.com eCommerce platform home page are controlled under Home Page Banners in the main menu:

Home Page Banners



When you edit an existing banner or add a new one, you will see these options:

View/Edit Post

Feed:

Date:

End/Expiry Date:

Headline:

Short Summary:

Sequence:

File: Currently: [DS DEMO banner images.002.jpg](#)
Upload: No file chosen

Link:
This is the link that the user will go when they click on the image.

Tags:
Example: 'Conference', or 'Conference, Retreat, Speaking'

Status:

Notes:

- **Sequence:** The number here controls the order of appearance when you have multiple banner images
- **File:** Upload your **950 x 400 JPG** image here
- **Link:** If you want to link to something when they click here
- **Status:** Online to appear in the set of banners on the web page, Offline to disable this banner image
- **Date and End/Expiry Date fields:** You can use these to set a Date when the banner image will automatically appear on your site. If you like, you can also set an End/Expiry date when it will automatically be hidden.

Filter Values

DonorShops has a filter field that may be called Project or Project Area or Author or Artist or whatever you like. This field is used to allow your supporters to narrow down the list of items displayed within the selected Category. Before you create your Category names, think about how you could use these in conjunction with your filter field values. In essence, you want to come up with two different ways in which you could categorize all of your products. If, for example, you were selling cars, you could have Categories for Ford, GM, Chrysler, Honda and Toyota. You could then have us set up your system so that your filter field label was 'Model Type'. This would allow you to specify a filter value for each car with things like 'Two Door', 'Four Door', 'Van', and so on. Now, when a customer went to the Ford category, they will see all the Fords you have, but they could also select the filter for 'Two Door' to just see the two door Fords.

	Ford	GM	Chrysler	Honda	Toyota
Two Door	Car 1, 2 and 3	Car 4, 5		Car 10, 11	car 12
Four Door	Car 18, 19, 20	Car 16, 17	Car 6, 7, 8, 9	Car 21, 22, 23	Car 13, 14, 15
Van		Car 24	Car 25, 26		Car 27, 28

If you can come up with an even distribution of your product, donation items and event items; it will make it easier for your supporters to browse through your offerings.

Blogs

You can create a blog in your DonorShops site! This is a great way to keep people up to date with what's going on in your organization. The key is to provide regular (**frequent**) updates to your blog.

Products

The main products screen lists all available products. Any donation item, event and items for sale are all considered to be Products to DonorShops.

Use this screen to:

- Add and update products

Products

Add product

 [Add Product](#)

		Code	Name	Author	Price (\$)
		2E878E9	4 Receipts Perforated Paper – 2000 sheets	8 x 14	117.00
		630D0C1	A Prisoner of War	John Cook	29.99
		B77F74C	Concert for a Home	Live2Give Productions	50.00
		B884F49	Fair Trade Coffee – Medium Roast	Cocoa for Good	13.99
		58BE242	st	Cocoa for Good	13.99
		31A7DE	NFP Annual Membership	NFPShop.com	100.00
		1C2	hip	NFPShop.com	500.00
		6D		8 x 11	75.00
		E246004	Support NFPShop.com	NFPShop.com	0.00

Listing (9) products

- View and update product images
- Edit product descriptions, prices, etc.



Use the edit icon to access details for the desired item.

Click the edit product icon to access or update product details:

View/Edit Product

Code (SKU):

Name:

Project Area:

Image: Currently: [9f35cf3_qcp_christmas.jpeg](#)
 Upload: No file chosen
Note: Only JPEG upload is supported.

Payment Type:

Price Type:

Goal Amount: \$

Leave blank to set no goal for this product.

Summary:

Categories:
[All](#) | [None](#)

☐ Classes
 ☐ Art Classes for Kids
 ☒ Christmas Wishlist
 ☐ Feed the Whales
 ☐ Swag
 ☐ Pledges
 ☐ Building Program

'Add to' Label:
Leave blank to default to 'Add to Cart'

Active Date: Starting: Ending:

Out of Stock:

URL: <http://demo.donorshops.com/product/AA6C104/2mealsperday.php>

-  **Options:**
- ☒ Show product on website
 - ☒ New product
 - ☐ Featured product
 - ☐ Enable DPO Tributes
 - ☐ Enable Social Buttons
 - ☐ Enable Facebook Comments

 [Duplicate This Product](#)



Stock & Price

Field Notes:

Field Name	Comments
Code (SKU)	DonorShops automatically assigns a value to these that you can change if you like. SKU values may contain letters and numbers but must NOT contain any spaces or special characters – e.g.; !@#\$\$%^&*()_+
Name	The name of the product that your site visitor will see and can search for
Filter value (or other filter name such as Author/Project/etc.)	The field under the Name field corresponds to the filter box in the category window. Your site may call this 'Filter', 'Author', 'Project Area (like in the above example) or some other name. The label for this field depends on what you

	selected for your site in the Advanced Settings Product Filter Label field. When the site visitor is looking at the product items in a particular category, they can select this filter to narrow down the list of products within the category
Image	At this time, only JPG images are supported. These images will automatically be resized by DonorShops, but if you use images that are too small they will look pixilated and if you use very large images they will take a very long time to load. Please respect the patience of your site visitors by saving all product images as 70 % image quality. They will look the same but load much faster
Payment Type	Select 'Add to Cart' for non recurring items or Recurring Payment for pledge items. Please note that while DonorShops creates the initial pledge, DPO runs subsequent recurring payments using the DPO EFT Transactions function.
Price Type	Choose Fixed Price when you want to preset the price. Use Let Customer Choose when you want to allow the site visitor to fill in an amount.
Goal Amount	Allows you to set a fundraising goal for a particular product and display progress towards that goal. See separate subheading on this topic for more information.
'Add to' Label	You can change the value of the 'Add to Cart' button with this field. Examples: 'Register Now', 'Give Now', etc.
Active Date	You can use these two fields to have DonorShops display the product starting on a specific date and, if you like, have it hide the product as of the Ending date. The 'Show product on website' checkbox must also be selected (checked) for the product to display.
Out of Stock	Controls what DonorShops will do when the particular variant of the product reaches zero.
Limit # of Sales	Provides a product level override for the Stock & Price variant quantity levels when used in conjunction with the Out of Stock option
Stock & Price variants	See following section

- **Some fields shown above will not be visible if you have a DonorShops LITE system.**
- Depending on your version of DonorShops (LITE, PRO, UNLIMITED), you may see additional fields in this screen for inventory control, product variants and Custom Field definition. These will be discussed later in this document.
- If you want the DonorShops.com eCommerce platform to show a sale price for an item, set the Sale Price field to the sale price. To end the sale, either delete the value or set it to zero (either action sets the field value to zero) and save the item. The sale price will be removed.
- For donations, set the Price Type to 'Let Customer Choose'. This will allow the customer to put their own donation amount in.
- If you want a fixed donation amount, set the Price Type to the desired amount.
- **This screen also includes a list of available taxes and allows you to select which ones apply to this product. These are shown and discussed under the Tax Rules section of this document.**

DPO Integration Fields

This page also provides access to the DonorPerfect Online integrated fields.

DonorPerfect Integration

General Ledger:	ESTORE
Campaign:	CLASS
Solicitation:	WEB
Sub Solicitation:	NCS
Type of Gift:	VISAEFT
Fair Mkt. Value:	0
TY Letter Code:	GT
Gift Memo:	The Owl and The Pussycat
Department:	Cardero St. Theatre
Purchase Type:	THEATRE

Gift UDFs

Edit	Field Name	Code	Description	Active (Click to Change)	Delete
	GL_CODE	BF-R	Building Fund (R)	✓	
	GL_CODE	CF-N	Campaign Finance Reform (N)	✓	
	GL_CODE	CR-R	Campaign Reform (R)	✓	
	SP		Child Sponsorship		

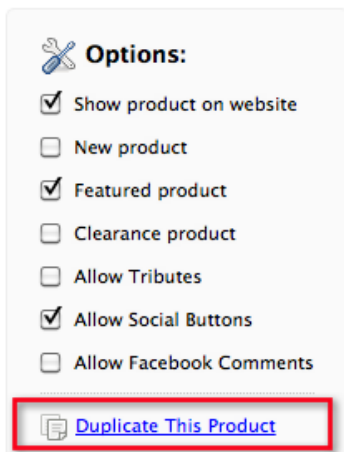
It is important to add in the DonorPerfect codes exactly as they appear in the CODE column of your DonorPerfect Online system so that all purchases are tagged correctly.

Suggestion: In DPO, go to Settings > Code Maintenance and select the desired code type; e.g. GL Codes and then click the Export to File button. You can now copy from the exported CODE column and paste into the appropriate field in the DonorShops.com Product Detail screen.

Fair Mkt Value field: Normally, you don't have to put anything in here. IF, however, you have another DPO field that does a calculation based on the value in this FMV field then you **MUST** put a zero (0) or other amount in this field (as appropriate) for every product in your DonorShops system. Otherwise, the field that holds the result of your calculation won't have any value for these gifts. Example: A Receipt Amount field that equals the Amount minus FMV.

Duplicate This Product

You can now duplicate products for situations where you want to create a new item based on an existing one!



Options:

- ☒ Show product on website
- ☐ New product
- ☒ Featured product
- ☐ Clearance product
- ☐ Allow Tributes
- ☒ Allow Social Buttons
- ☐ Allow Facebook Comments

 [Duplicate This Product](#)

Notes:

- You will need to change the SKU as it creates a new one with '-COPY' appended to the end. Remember that you can have any combination of numbers and letters in your SKU values but no special characters (e.g., !@#\$%^&*()_ -
- You will also want to change the product name and check all other fields to make sure that the new product has all the desired values

Payment Type: Recurring

DonorShops allows you to create recurring payment items (Pledges) with monthly, quarterly or yearly payment intervals or you can set a recurring payment item to 'Let Customer Choose' and then the donor will be able to select the payment interval.

Payment Type:

Recurring Payment ▼

Let Customer Choose ▼

In previous versions of DonorShops, it created the pledge in DPO but did not make an initial pledge payment charge. **This has changed** so that when the site visitor processes their cart, an initial pledge payment will be made and charged to the purchaser. We have made this change due to DonorShops client requests to make pledge handling consistent with the way WebLink handles pledges.

Key Points:

- The initial pledge payment is made by DonorShops at the time of the pledge purchase
- As before, subsequent pledge payments are handled by DPO when you do the EFT Transactions process
- DonorShops applies some logic when it creates the pledges in DPO so that:
 - If either Weekly or Bi-Weekly is chosen, the customer is presented with day of week options instead of day of month options. Both the day-of-week and day-of-month options are selected in the /settings panel.
 - If either Weekly or Bi-Weekly is chosen, DonorShops will schedule the pledge start date for the first date of the selected day that is at least seven days from their order date.

- DPO will not charge them again within the month they signed up for the pledge
- DPO will not charge them again if the selected payment date (typically the 1st or 15th) **falls within ten days** of their pledge sign-up date. If it does, DonorShops will move the DPO pledge start date to the appropriate date on the following month.
- If you want the above '**ten day rule**' changed to a different number of days, this can be adjusted on your system. If so, contact us at **theteam@donorshops.com**
- **Example:** I sign up for a \$30 monthly pledge Sept. 28 and choose the 1st as my regular pledge withdrawal date. DonorShops will set the DPO pledge start date as November 1st because the automatic date would have been less than ten days after their pledge signup
- **Example:** I sign up for a \$30 monthly pledge Sept. 3rd and select the 15th as my regular pledge withdrawal date. DonorShops will set the DPO pledge start date as October 15th because even though the selected date isn't within ten days, it waits until the following month
- **Example:** I sign up for a \$30 monthly pledge on Sept. 12 and choose the 1st as my regular pledge withdrawal date. DonorShops will set the DPO pledge start date as October 1st because it is in the following month and does not fall within ten days of the pledge signup.

All subsequent pledge payments are processed in DPO using the **Tasks > EFT Transactions** screen. More help on this is available through the DPO Online Help and Knowledge Base:

Step 1: Generate Transactions Step 2: Review Transactions Step 3: Process Transactions

Pledges due through: 07/31/2012
 Last processing date: 02/01/2012
 Processing date: 07/31/2012
 Payment type filter: Credit Card
 Currency type filter: CAD Canad

Billing Amount to Use:
☒ Billing amount but not greater than pledge balance
☐ Billing Amount
☐ Billing amount plus past due amount
☐ Set Selection Filter...

Refresh Transactions Process Transactions Clear All

Eligible Pledges Found With Criteria: Pledges due through = 07/31/2012, Payment type = Credit Card

Name	Account Number	Vault ID	Total / Balance / Frequency	Start Date	Amount to Process	Currency	Status
Brown Paul	Visa (x1111)	1048026650	Total: \$0.00 Balance: \$0.00 Frequency: Monthly	06/15/2011	\$15.00	CAD	Ready to Process

Goal Oriented Product Items

You can now set goal values and display progress towards the goal in DonorShops:



The goal is setup within the product and allows you to either get the goal progress amount purely based on DonorShops purchases of this item or from DonorPerfect Online contributions towards the GL Code, Solicit Code, Sub-Solicit Code and Campaign Code currently defined for this item:

Goal Amount: \$ 15000 Track using DonorShops

Leave blank to set no goal for this product.

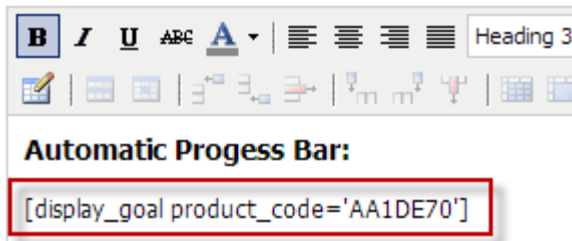
Goal Amount: \$ 15000 Track using DonorPerfect

Leave blank to set no goal for this product.

To create a goal oriented product:

1. Set an amount in the Goal Amount field
2. Put `[display_goal product_code='SKU VALUE']` into your page content window where you would like the goal display to appear (including the square brackets where **SKU VALUE** is the product SKU like this:

Page Content



Additional Notes:

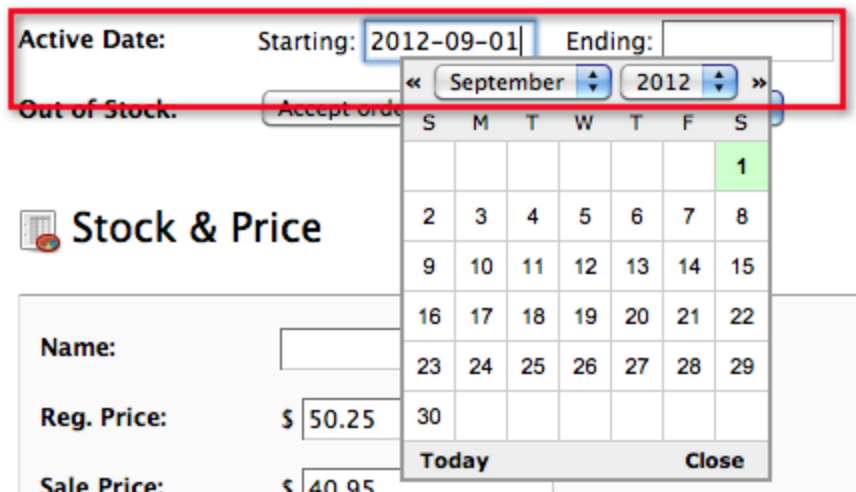
- You can also add an `offline_donation` parameter to allow you to adjust for offline donations received. In this example, \$23.45 has been received offline and so the goal progress amount will be adjusted by the offline donation amount.

`[display_goal product_code='AA1DE70' offline_donation='23.45']`

- These goal widgets can also be inserted within DonorShops content pages. If you do this, we suggest you also include text above the widget explaining what product the goal widget is tracking.

Product Active Date Range

You can now set up DonorShops product items with automatic 'From' and 'To' dates so that the product automatically becomes visible on your site on the 'From' date and is automatically removed on the 'To' date. If you don't want the product to be automatically removed, leave the 'To' field blank.

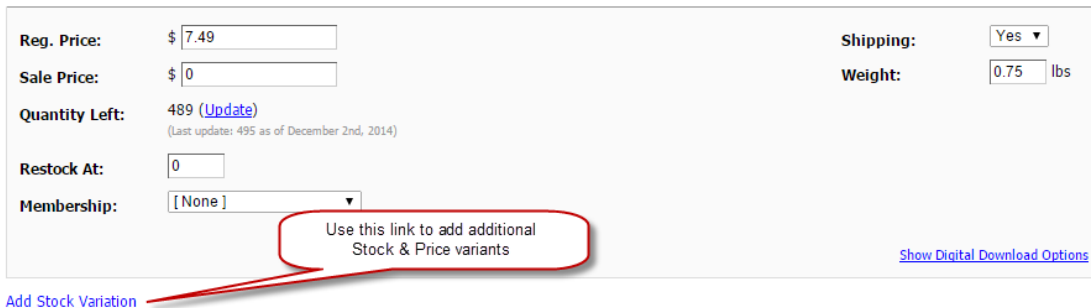


The screenshot shows the 'Active Date' section of a product edit form. It includes fields for 'Starting:' (2012-09-01) and 'Ending:'. A calendar picker is open, showing September 2012. The date 1st is highlighted. Below the calendar, there is a 'Stock & Price' section with fields for 'Name:', 'Reg. Price:' (\$ 50.25), and 'Sale Price:' (\$ 40.95). The calendar also shows the days of the week (S, M, T, W, T, F, S) and the months (September, 2012).

Stock & Price Variants

Applies to: DonorShops PRO and DonorShops UNLIMITED

Stock & Price



Reg. Price: \$ 7.49

Sale Price: \$ 0

Quantity Left: 489 ([Update](#))
(Last update: 495 as of December 2nd, 2014)

Restock At: 0

Membership: [None]

Shipping: Yes

Weight: 0.75 lbs

[Add Stock Variation](#)

Use this link to add additional Stock & Price variants

[Show Digital Download Options](#)

DonorShops allows you to specify multiple Variants for your products and each Variant can have a different price. You can also track Inventory Stock levels for each product and each variant of each product.

If you are a DonorShops Unlimited customer, you will also see a Membership field in each product variant. If this product is NOT selling a membership level, leave this field set to [none] for each variant.

Here are some examples:

- Event seating in Section A, Section B, Section C where the seats in each section have different prices
- Golf shirts in different sizes or colors – you can charge more for the XL and XXL if you like
- An event where you offer Friday Only, Saturday Only, Sunday Only or Premier Pass to all sessions
- Theatre productions where you offer tickets for different nights

Note: Make sure you set the correct Shipping value to Yes or No as appropriate. The DonorShops cart shipping panel will only show if one or more items in the cart require shipping. Also, if you're using Courier based shipping, you must have a non-zero weight for all shippable items in your DonorShops system.

To Add a Product Variant:

1. Open the desired product in the JPanel Administrative Interface
2. Click the Add Variation Button
3. Enter the name of the desired Variant. The value you place in the Variant field will show in the drop-down menu list.
4. Set the desired order of appearance using the '#' column (note: the drop-down menu item choices will automatically go to the first item that is NOT out of stock.)
5. Set the regular price of this Variant. You may also enter a sale price if you like.
6. Use the Update Stock link to set the quantity of this variant On Hand if you are using the Inventory Control features of DonorShops.
7. Add additional Variant(s) as required.
8. Save your changes.

Inventory Update Enhancement

The Stock & Price Section has been enhanced so that it now shows the following. (Note: You may need to refresh the page to see the new values):

Quantity Left: 489 ([Update](#))
 (Last update: 495 as of December 2nd, 2014)

- The quantity currently remaining in stock – 489 in the above example. As before, the remaining quantity is based on the last stock quantity update minus the number that have been purchased.
- The [Update](#) link to allow you to adjust the stock level – this was there before and has not changed
- The grey text highlighted in red: This shows:
 - The date when the quantity was last updated
 - The quantity of items that were set on that date

Custom Fields

Applies to: DonorShops PRO and DonorShops UNLIMITED

Custom Fields allow you to have the purchaser fill in additional information you want to capture when they make a purchase. These fields can be either optional or required. Here are some examples:

- Student names
- Parental contact information
- How did you hear about us?
- Special message to the recipient of a gift purchase
- Tribute names (Unmanaged)
- Allergies or special meal requirements

Custom Field labels and values are stored with the DonorShops orders and can be viewed in the Order screen as well as in the Track My Order screen viewed by the customer.

Custom Fields

#	Type	Label	Required
0	Select Box	Meal Preference	Not Required
1	Text	Student Name(s)	Required
2	Big Text	Special Requests	Required
3	Check Box	I hereby agree to all terms and	Required

[Add Input Field](#)

*Each select option must be on its own line.

Custom fields can now be created as **Text**, **Big Text**, **Select Box** or **Check Box** fields. They can also be linked to DPO custom Gift UDF fields in your system.

Please Note:

- Select Box options must be placed as one entry per line as shown in the example.
- **Select Boxes allow a single item to be selected.** If you need multiple selections, just create additional select box fields - e.g.; Person 1 Meal Choice, Person 2 Meal Choice, etc.
- **If a Check Box is set as 'Required'**, the customer will not be allowed to check out the item unless they have checked the checkbox. This can be really useful for situations where you need the purchaser to agree to terms before accepting the purchase.
- As always, **avoid setting custom fields as 'Required'** unless you really need the field completed. DonorShops will not allow them to purchase the item without completing all fields that are set as 'Required'
- Big Text is a memo type field for multi-line input by the site visitor

Custom Field Gift UDF Links

You can have up to **fifteen (15)** custom Gift UDFs (User Defined Fields) set up in your DonorShops system.

Gift UDFs are fields you create on the gifts screen tab of your DonorPerfect Online system. If you are not sure whether a field is a gift UDF or not, please contact DonorPerfect support for clarification & confirmation.

These fields show up as additional fields under the DPO Integration area in your product details screen in JPanel.

Refer to DPO Online help for information on how to setup custom Gift UDFs.

DonorShops Specific

Purchase Type: Hosted Event (dropdown)
 Department Code: Promotions (text)
 Participant Names: Jim, Sue, Carol (text)
 Regular Meals: 2 (text)
 Vegetarian Meals: 1 (text)

You can now link Custom Fields to these custom Gift UDFs!

Custom Fields

#	Type	Label	Required	Map to UDF	Options*
1	Text	Number of Standard Meals	Not Required	Regular Meals Qty	
2	Text	Number of Vegetarian Meals	Not Required	Vegetarian Meals Qty	
3	Big Text	Attendee Names	Not Required	Participant Names	
4	Select Box	Seating Preference	Not Required	(None)	Close to band Close to head table Close to door Close to food

[Add Input Field](#)

*Each select option must be on its own line.

- Possible Applications:
- Meal Preference fields in your DPO system that record the number of people in your party who want regular meals, vegetarian meals, etc.
- A 'Where did you hear about us?' custom field that is linked back to DPO so you can run a report to retrieve these directly from DPO
- A 'Give In Honor Of' field on a DonorShops product that links back to a custom Gift UDF field in your DPO system so you can have non-managed tributes in your DPO system (search on 'tributes' in this support site to learn more about the difference between managed and non-managed tribute items)
- A select list of people's names that link back to a custom Gift UDF field in your DPO system. This would allow people to pick the name of the person they want to sponsor with their gift!
- A linked 'Send me the newsletter' checkbox field that you can use in a DPO Constant Contact dynamic mailing list filter
- A linked 'Participant Names' text field so when a family signs up for an event, DPO has the list of all the family members
- You can use the same Gift UDF over and over again in different products – e.g.; a 'Participant Names' field that gets used by many different DonorShops event items but you cannot use a particular Linked Gift UDF field more than once within a product..

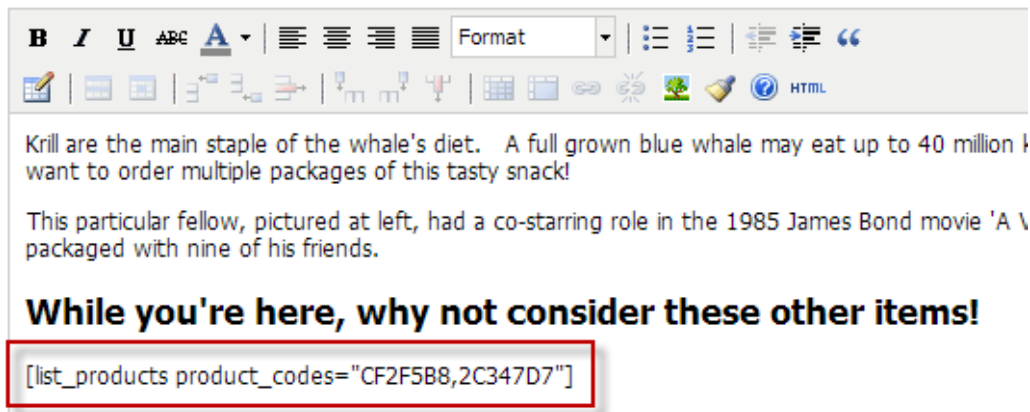
NOTES:

- If you are using a linked custom field that connects to a DPO Gift UDF with a Data Type of '**Number**', we strongly recommend you use a **Select Box with the number choices filled in**. This will prevent people from typing text into the field – e.g.; 'two' instead of 2 as DPO will reject non-numeric text entries in fields that are set up with a Data Type of 'Number'
- If you are linking to a DPO Memo field, use the Custom Field type of **Big Text**
- If you are going to link to a DPO Gift UDF with a data type of 'Date', please make sure your custom field Label text shows the site visitor the date format that DPO .
 - The required format is **mm/dd/yyyy**

Link a Product to Another Product

There is a shortcode widget you can use to provide product link(s) to one or more other products from within the Page Content section of your product details screen:

Page Content



The shortcode widget includes the SKU value (or values separated by commas as shown) of product(s) you want to link to like this:

```
[list_products product_codes='CF2F5B8,2C347D7']
```

This example shown on DonorShops DEMO site:
<http://demo.donorshops.com/product/B1CE9BB/tastykrill.php>

Other Fields

URL

The product screen now includes a URL field. This allows you to select and copy this URL in case you want to use it elsewhere in your web environment, e.g.; as a page link that goes directly to a product or from your main website.

Email Notify

When a site visitor makes a purchase, they receive an order confirmation email from DonorShops. When your DonorShops site was set up, you also had the option of receiving a 'BCC' at one or more email addresses in your organization to notify you that an order had come in.

This new field allows you to ALSO send a 'BCC' of this order confirmation to one or more email addresses when they purchase **this particular product**. An example of this would be an event registration where you have a particular person in charge of all registrations for this event. In this scenario, you could add the event coordinator's email address in this field and they would also receive the 'BCC' order confirmation email just for registrations for this event.

As indicated on the product page under this field, multiple addresses must be separated with a comma.

SEE ALSO **Email Notifications** SECTION IN THIS DOCUMENT

Tributes

In DonorShops, you can create tribute donations in either of two ways:

- **Managed Tributes** where the system will display a list of active tributes set up in your DPO system
- **Unmanaged Tributes** where you create a Custom Field to allow the user to type in the name of the person who the tribute is for.
 - This type of tribute is available in DonorShops PRO and UNLIMITED as it uses Custom Fields (which are not included in DonorShops LITE)
 - Unmanaged tribute names are visible in your DonorShops order but are not currently forwarded to your DPO system

To Create a Managed Tribute:

- Select the 'Allow Tributes' checkbox in the Product Detail window
- Use the DPO Tribute functionality to define the tributes.
- The DPO tribute 'Description' field for any active tributes will be displayed in DonorShops
- Control whether a tribute is active or not by using the From and To fields in the DPO tribute

To Create an Unmanaged Tribute:

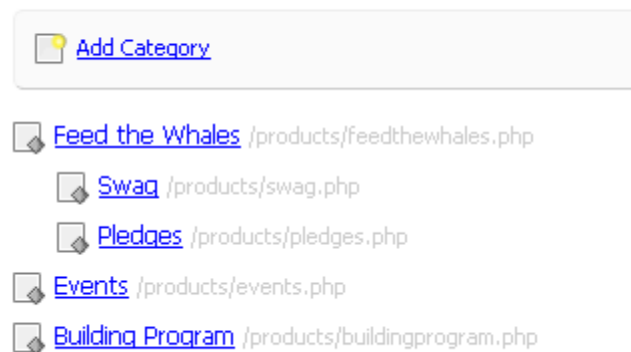
- Add a Custom Field to your product
- Add a label that says something like "Tribute To:" or "In Honor Of"
- The name(s) they fill in when they make a tribute donation will appear in the product order details when you use the Export function in the Orders screen

Categories

Although the DonorShops.com eCommerce platform does not limit the number of categories you have in your system, you should not normally have more than seven or eight top level categories; otherwise the category names may appear over your logo.

DonorShops Pro and Unlimited also allow you to have one level of nested category headers. For example, you could have a Merchandise category with subcategories under this for Books, Clothing, and DVDs.

Product Categories



The main Categories screen lists all the available categories and allows you to add new categories or edit/delete existing categories:

Use the edit icon to access details for the desired item.

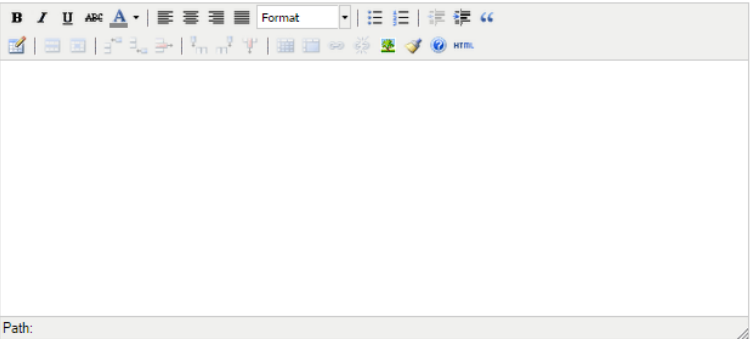


View/Edit Product Category

Sequence:

Name:

Description:



Path:

Parent Category: Feed the Whales ▼

Url: .php
This value cannot contain any special characters.

Header Image: Currently: No file uploaded
 Upload: Choose File No file chosen

Save Delete Cancel

Use the Sequence field to control the order in which the categories display on your DonorShops.com eCommerce platform site. If you do not specify a sequence number, it will default to zero and will become the leftmost category displayed.

You can add text, images and video to the Description field in the category. To add images, upload the image(s) to the Image Library and then include reference links to these the same way you would if including images into page content. For more information on how to do this, please see the Images section under Site Configuration Tips in this document.

You control which categories a product appears in within the Products screen:

Categories:

[All](#) | [None](#)

☐ Feed the Whales

☐ Swag

☒ Pledges

☒ Events

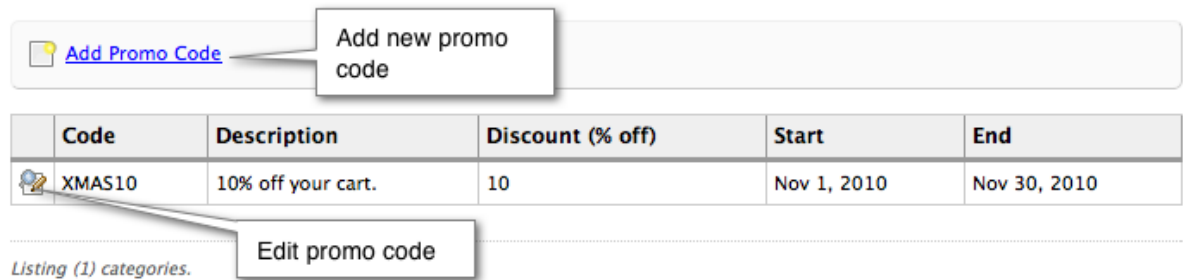
☒ Building Program

Promotional Codes

Feature Applies To: DonorShops PRO, UNLIMITED

You can define promotional codes in the DonorShops.com eCommerce platform that allow users to get a discount on the contents on their cart if they enter a valid promotional code. The DonorShops.com eCommerce platform also allows you to specify a valid 'from' and 'to' date so that your promotional codes become active on the 'from' date and become inactive on the 'to' date.

The Promotional Codes screen is available by clicking on 'Promo Codes' in the main menu:



The screenshot shows the 'Promo Codes' management interface. At the top, there is a button labeled 'Add Promo Code' with a yellow star icon. A callout box points to this button with the text 'Add new promo code'. Below the button is a table with the following columns: Code, Description, Discount (% off), Start, and End. The table contains one entry: Code 'XMAS10', Description '10% off your cart.', Discount '10', Start 'Nov 1, 2010', and End 'Nov 30, 2010'. A callout box points to the 'Code' column with the text 'Edit promo code'. Below the table, it says 'Listing (1) categories.'

Code	Description	Discount (% off)	Start	End
XMAS10	10% off your cart.	10	Nov 1, 2010	Nov 30, 2010

Listing (1) categories.

Promotional codes can be applied to individual product(s) or to one or more categories of products:

When you edit a promo code or add a new one, you will see this screen:

View/Edit Promo Code

Code:

Description:

Discount: % OFF each product

Valid from: to

Categories:

☒ Feed the Whales
☐ Swag
☐ Events
☒ Pledges
☒ Building Program

Hold CTRL (Command on Mac) key to select multiple options. [Select All](#) / [Clear All](#)

Products:

☒ Membership: Recurring (CF2F5B8)
☒ Moby Dick - The Musical!, Event (28BC7E8)
☐ New & Replacement Computers, Building Project (EB05948)
☐ North End Performance Seam Sealed Jacket, Product (AA75D61)
☐ Office Furniture, Building Project (1D9A984)
☐ SavingWhales Computer Backpack, Product (638DCDC)
☐ SavingWhales Conference Registration (C4D3E12)
☐ Seminar by Captain Aronnax Nemo, Event (C3D0BE1)
☐ Tasty Krill, Pacific (B1CE9BB)
☐ test tribute product nonrecurring (125028F)

Hold CTRL (Command on Mac) key to select multiple options. [Select All](#) / [Clear All](#)

Use this screen to:

- Set the promo code in the Code field
- Add a description
- Specify the discount amount
- Specify Valid from and to dates. Promo codes will not be available before or after the specified date range
- Select categories to which the code will apply – you can select multiple categories using the CTRL key
- Select products to which the code will apply – you can select multiple categories using the CTRL key
- Save changes or delete promo codes

Checkout

View Cart / Checkout

This screen shows the purchaser the items they have purchased, prices, taxes, shipping and total order price.

They also use this screen to enter their Billing Information, enter comments if desired as well as their Payment Information.

When they click the button to complete their purchase, the DonorShops.com ecommerce platform will communicate with DonorPerfect Online and either add the purchase to an existing DPO donor (if the information they filled in matches the name, address and postal (zip) code of an existing donor OR create a new donor in DPO and add this gift to the new donor. If the purchaser put slightly different information in with the purchase than you have on file in DPO, you can use the DonorPerfect **Utilities > Duplicate Removal** tool to identify and merge any undesired duplicates.

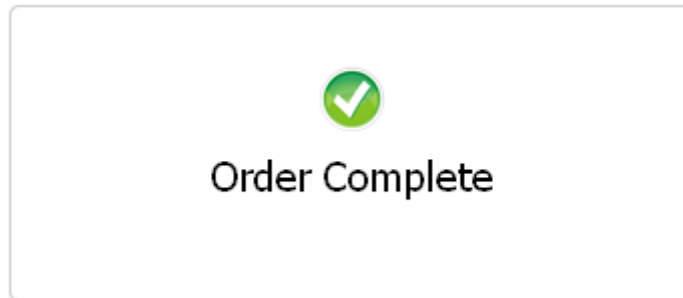
NOTE: Site visitors will only see the Shipping Information panel if one or more items in their card is a product that you tagged as 'Requires Shipping'.

If you have the DonorShops Login Feature, your site visitors will also see a Remember Me panel under the credit card information where they can register for an account on your DonorShops system.

Checkout

Shipping Information	Billing Information	Payment Information
First Name:	First Name:	Card Type: Visa
Last Name:	Last Name:	Card Number:
Email:	Email:	Expiry Date: 01 2011
Country: Canada	Country: Canada	CVD/CCID:
Address:	Address:	Last 3 digits on the back of your card.
City:	City:	Complete Purchase
State/Province:	State/Province:	Your credit card will be charged.
Postal Code:	Postal Code:	
Phone:	Phone:	
Billing Address is the Same		

When they fill in the required fields and complete their order, they will see the order confirmation screen as shown below.

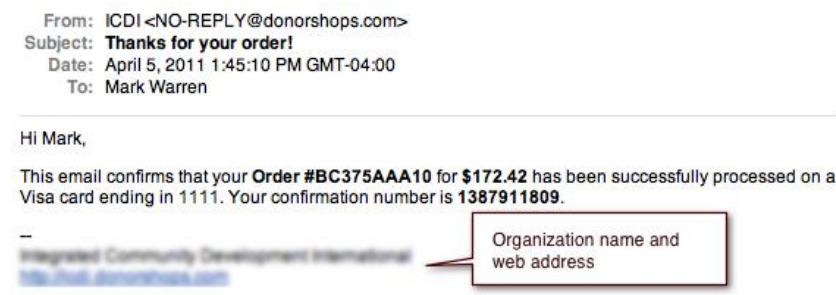


Please note that DonorPerfect is always provided with the name & address information in the Billing fields as the person ordering might have sent the order to a friend or family member, but the Billing information always corresponds to the person paying.

DPO will always use the Billing Address information for donor identification and creation even if a separate shipping address is provided.

EMAIL Notification

When the customer completes their order and the payment processor confirms validity of credit card data, the purchaser will receive an email confirming their order and the amount.



You can have your DonorShops system send you a 'BCC' of the customer order to one or more preset email addresses by entering the desired email addresses in the BCC field for the desired email notification.

Bcc:
Must be a comma separated list.

DonorShops also provides an **Email Notify** field so you can append additional email addresses on a per product basis. This allows you to have a particular person (or persons) who are managing a particular product and to send a copy of the order confirmation email as well when an order for the product is received.

Email Notify:
An email notification will be sent to these addresses anytime this product is purchased. Multiple addresses must be separated with a comma.

Orders

Use the Orders screen to view new orders and to update the order status to Complete.

Orders

Callouts:

- Show all, uncompleted or completed orders
- Quick update order status using check boxes
- Export orders to CSV
- A completed order
- An new order
- Access order details

	Order No.	Customer	Items	Total (\$)	Created Date
☐	259B453355	Mark Warren	3	179.98	Dec 3, 2010 15:26:14
☐	48F0BE88C3	Jen Ward	2	234.00	Nov 30, 2010 17:02:11
☐	AEC37E4653	Laurence Morel	1	150.00	Nov 25, 2010 08:41:34
☐	28E8A9BB51	James Smith	5	659.98	Nov 17, 2010 15:11:31
☐	CCD8B18ECA	Mark Warren	5	149.98	Nov 16, 2010 16:12:28
☐	3D029B1F43	Mark Warren	5	337.45	Nov 16, 2010 16:12:28
☐	868B...1505	Josh Bloomfield	8	1559.97	Nov 16, 2010 16:33:03
☐	6...		6	1.00	Nov 16, 2010 16:28:23
☐	B...		6	1.00	Nov 16, 2010 13:08:06
☐	6E27A6B87C	Mark Warren	3	159.98	Nov 16, 2010 12:51:17
☐	508A2D3F93	Mark Warren	1	100.00	Nov 16, 2010 12:29:43
☐	A4CCBCB49C	Josh Bloomfield	1	100.00	Nov 16, 2010 12:29:40

To mark orders completed from this screen, click the check boxes for the desired items then use the 'Mark Selected As....' menu item.

The Order Details screen shows additional information for the selected order and allows you to mark the order as complete.

View/Edit Order #BC375AAA10

 Order Details

Order No.:

Created Date:

Payment: \$

Confirm. No.:
From Payment Gateway

Confirm. Date:

Order Comments:

 Options:☐ This order is complete. Billing Information Shipping Information

This screen also lists order details and shows the DPO Donor ID of the purchaser as well as the Gift ID number(s) associated with the orders:

 Items Ordered

Code	Name	Promo	Qty	Price	Total
B1CE9BB	Tasty Krill		3	19.79	59.37
2C347D7	Whale Tail Poster		2	39.95	79.90
75DD755	Whale Stickers		1	9.95	9.95
					149.22

 Taxes Paid

Code	Products	Cost (\$)	Rate (%)	Tax (\$)
MD Tax	Tasty Krill (\$59.37)	59.37	6.00	3.56
				3.56

 DonorPerfect Integration

Donor ID#: [153](#)

Gift ID#(s): [10570](#), [10571](#), [10572](#)

Donor ID#s and Gift ID#s:

Notice the linked Donor ID# and Gift ID# fields at the bottom of the order screen (above). These can help you track an order back to your DPO system.

A separate DPO Gift ID will be created for **each unique combination** of the DonorPerfect Integration field code values within all purchased products within an order. This ensures that all items purchased are **always** tagged with the correct values in DPO. If the purchaser ordered several items that use ALL the same codes, they will appear as ONE gift in DPO.

The Donor ID and Gift ID numbers show at the bottom of the order are links that can be opened to show key Donor / Gift field data retrieved from DPO. NOTE: The Donor ID number show in the Gift ID# popup window will always show the same Donor ID# that you see in the Donor ID# link UNLESS you have done a DPO Duplicate Removal and merged this Donor ID# with another. In that case, go by the Donor ID# that is shown in the Gift ID# link popup window. It will have the correct (new) Donor ID number.

NOTE: If you have merged the purchasing donor into another DPO donor through the DPO Duplicate Removal tool, the Donor ID# field will still show the original Donor ID number. To view the new merged Donor ID number, click on any of the gift ID numbers and the Donor ID number you see in there will reflect the new Donor ID number.

DPO

This screen shows the gifts created within DPO for this sample purchase:

James Smith (154)							
Main Gifts Pledges Tributes Contacts *Bio* Other Info *Links* Add							
Add Gift View Giving History And Summary							
	Gift Date	Amount of Gift	Record Type	GL Code	Solicitation Code	Gift Type	Reference
Edit	11/17/2010	500.00	Gift	.Rcpt: DESIGNATED	ESTORE PURCHASEs		28E8A9BB51
Edit	11/17/2010	100.00	Gift	.Rcpt: CONFERENCE INCOME	ESTORE PURCHASEs		28E8A9BB51
Edit	11/17/2010	59.98	Gift	NO Rcpt: PRODUCT Sales	ESTORE PURCHASEs		28E8A9BB51

Also, please note that the DonorShops.com eCommerce platform order **Confirmation Number** is shown in the Reference column. This reference number is the SafeSave Transaction ID number and can easily be pasted into a SafeSave Transaction ID search to retrieve the SaveSave payment details.

Each DPO gift created will also show the codes you entered for the purchased product in DonorShops including:

- GL Code,
- Campaign Code,
- Solicitation Code,
- Sub-Solicitation Code
- Type of Gift
- Fair Market Value
- Thank You Letter Code
- Gift Memo
- PLUS any Gift UDF fields defined for your system (maximum 15 per system)

DPO Calculated Fields

Any calculated fields in your DPO system which rely on gifts created by DonorShops – e.g.; a calculated Receipt Amount field based on the Gift Amount minus **Fair Market Value** are handled slightly differently in DPO than fields entered through the DPO user interface.

If you do NOT have any DPO fields which calculate their results based on DonorShops gift/UDF fields, you can ignore this procedure.

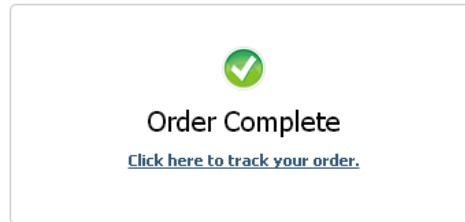
To make DPO update the calculated results:

1. Go to **Settings > Calculated Fields**
2. Click the 'Recalculate All User Defined Calculated Fields' button.
3. DPO performs the selected calculations for all existing gifts.

Order Processing

DonorShops.com eCommerce orders are processed through the **SafeSave Gateway**.

- Your SafeSave gateway interface is accessed via DonorPerfect Online interface (DPO: App Links: Processing Gateway).
- When the payment processor confirms the credit card purchase, the purchaser is shown a screen confirming that their order is complete:



- If you open the Order within DonorShops JPanel, you will also see a confirmation number in the Confirm. No field. This number is the SafeSave Gateway transaction ID number which you can search on in your DPO SafeSave Gateway interface (DPO: App Links: Processing Gateway).

When the site visitor completes their DonorShops transaction, DonorShops will automatically communicate with DonorPerfect and...

- Determine whether the site visitor already exists in DonorPerfect based on their name and address information
- If the site visitors name and address information already exists in DonorPerfect, DonorShops will use their donor ID number for the creation of the gift(s) that will be associated with this donor.
- If the site visitors name and address information are not matched, DonorShops will create a new donor in DonorPerfect.
- DonorShops then communicates with DonorPerfect to have the gift(s) added to the new or existing donor.
- DonorShops uses the DonorShops Product DPO Integration fields to determine what gift(s) are created.
- Gift amount(s) will include the price of the donation or purchase but do not include shipping or tax amounts.
 - Shipping amounts can be viewed in DonorShops in the Order Details window and are also included in a column of the Export Selected CSV order export output
 - Tax amounts can be viewed in DonorShops Order Details and tax totals are displayed in the DonorShops Tax Reconciliation report
- If, for some reason, DonorShops does not receive a response from DonorPerfect during this process, the DonorShops order will be marked in red in the DonorShops Orders list screen.

		CBD722FB7C	Order Status	Order ID	1	\$0.00	Aug 27, 2012 12:46pm
--	--	-------------------	---------------------	-----------------	----------	---------------	-----------------------------

- Also, going into the order details window for this order will show a **'Sync to DonorPerfect'** link that causes DonorShops to re-try to synchronize the order with DonorPerfect. This function

will trigger the donor recognition and gift creation logic within DonorShops but does not reprocess the credit card charge. The credit card charge will already have been processed when the order was placed.

DonorPerfect Integration

Donor ID#:

Gift ID#(s):

- 

Also, on successful payment processor confirmation, the order is entered into the DonorShops.com system as an Incomplete Order (i.e.; hasn't been marked as processed yet within DonorShops.com – e.g.; *the book they purchased hasn't been sent to the customer yet*):

Orders: Incomplete

 Filter ▾  Mark Selected as... ▾  Export Selected					
	Order No.	Customer	Items	Total (\$)	Created Date
	 OA83393E24	Mark Warren	1	1.23	Apr 7, 2011 11:54:58

When you open (edit) the order from the orders list, you will see the order details including the DonorShops.com confirmation number (Code column). You will also see the Donor ID to whom the order was applied and the Gift ID number(s) that have been created:

DonorPerfect Integration

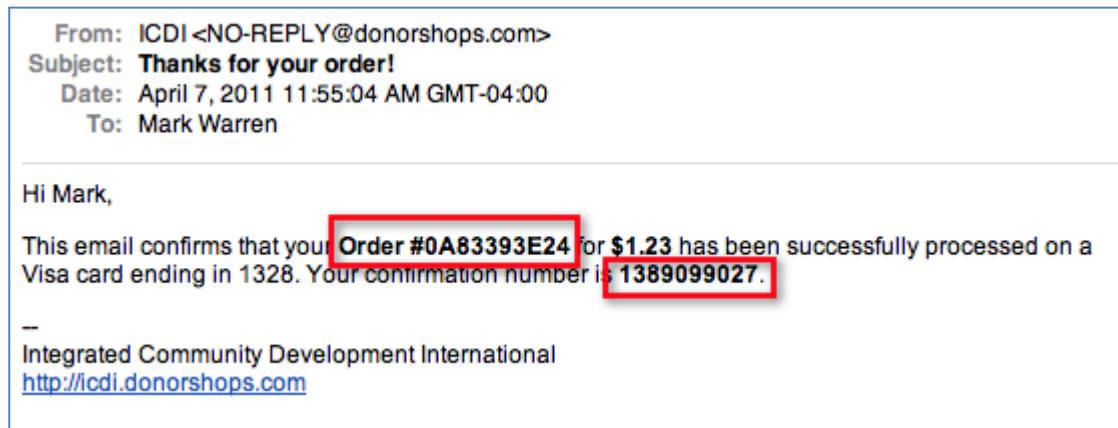
Donor ID#: [135](#)

Gift ID#(s): [10788](#), [10789](#)

- The purchaser will also receive the 'Order Received: To Customer' email.
- The purchaser will also receive the 'Order Received: To Customer' email.

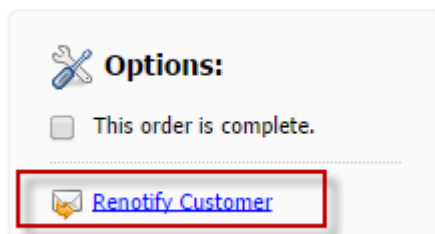
The person who placed the order also receives an email from DonorShops.com confirming the order.

This email includes the DonorShops.com Order Number, the purchase amount and a Confirmation Number which is the SafeSave Transaction ID number:



Resend Customer Emails

If, for some reason, a customer indicates that they did not receive their order email(s), you can have DonorShops resend the order email(s) by going into the order details screen and clicking the **Renotify Customer** link. This will tell DonorShops to resend any emails that were associated with the order including any custom Email Notifications (e.g.; eTicket or Gift eCard):



In DPO, you can now see the gift details including the Reference/Check No. **The DPO Reference/Check No. is the Transaction ID number in the SafeSave Gateway.**

You can copy the number from this field to use it in the search for the transaction in the SafeSave Gateway. There is also a reference in the Gift Memo field showing the DonorShops.com Order Number:

Gift ID #	8309
Date	4/7/2011 
Gift Amount	\$1.23
Fair Mkt. Value	\$0.00
Type of Gift	Credit Card
Reference / Check Number	1389099027
General Ledger	DonorShops.com - eStore
Campaign	
Solicitation	Donations - eStore
Sub Solicitation	
Thank You Letter	
Receipt Delivery	Letter
Associated Address	
 Gift Memo	DonorShops.com Order #0A83393E24

To access the gateway, select the **App Links** menu item then choose **Processing Gateway**. If this menu item is not visible, it is because your DPO account does not have this option selected. Please consult the system administrator within your organization for access.

When you have clicked on this link, you will be presented with a login page. You will need to enter the username and password provided by your SafeSave Account Manager. If you do not have a username and password for this, please consult the system administrator within your organization for access.

Once logged in, select the **Reports** menu item:

donorperfect online

Main Menu
[Home](#)
Credit Card
[Sale](#)
[Authorize](#)
[Capture](#)
[Void](#)
[Refund](#)
Electronic Check
[Sale](#)
[Void](#)
[Refund](#)
Recurring
[Add Subscription](#)
[List Subscriptions](#)
[Add Plan](#)
[List Plans](#)
Customer Vault
[Add Customer](#)
[List Customers](#)
[CertifyPCI™](#)
[iSpyFraud™](#)

Home » Reports

Transaction Snapshot

Group By:

Start Date:

End Date:

Search Transactions

Status:

Transaction Type:

Processor:

Action Type:

Now use the Search Transactions window and paste in the Transaction ID from DPO:

Search Transactions

Status:

Transaction Type:

Processor:

Action Type:

Transaction ID

Order ID:

The search will retrieve the specified transaction:

Transaction Report

04/01/2011 12:00 AM To 04/07/2011 11:59 PM

1 - 1 of 1 Transactions

TRANSACTION REPORT						
Type	Status	ID	Customer	Details	Time	Amount
Card Sale	Approved	1389099027 0A83393E24	Mark Warren mark@markwarren.ca	4...1328	4/7/2011 11:55:01 AM	1.23

1 - 1 of 1 Transactions

If you click on the blue hyperlinked transaction ID, you will see the transaction details:

[Create Subscription](#)

Transaction Detail			
Void Refund Charge Again: (Auth Sale) Back Print Receipt E-Mail Receipt			
Merchant:			
Date/Time:	04/07/2011 11:55:01 AM EDT		
Transaction ID:	1389099027		
Transaction type:	Card Sale		
Status:	Pending Settlement		
Credit Card Information			
CC Type:	Visa		
CC Number:			
CC Expiration:			
Auth. Code:			
AVS Status:	Exact match, 5-character numeric ZIP (D)		
CVV Status:	CVV2/CVC2 Match		
Processor:	Mercury		
Currency:	USD		
Billing Information	Shipping Information		
Order Information			
Order ID:	0A83393E24		
Transaction History			
Type	Status	Transaction Time	Amount
Card Sale	Success	04/07/2011 11:55:01 AM EDT	1.23
	AP	API [donorshops@icdi.donorshops.com]	

Inventory Stock Management

Applies To: DonorShops PRO and UNLIMITED

DonorShops allows you to enter, update and report on the inventory stock level of each product item and each defined variant of each product item.

There is a **Qty On Hand** field in the Product Details screen that allows you to set the stock inventory level for a product (and for each defined variant of each product). **The value shown in this field always reflects the inventory level you last set for this product (variant).**

It is the **Product Stock Levels** report that will show you the **CURRENT** inventory stock level for each product(variant) based on any purchases made **since** the last update of the Qty On Hand field. The number in the **‘Remaining’** column of this report shows how many you currently have in stock.

Events and Training Classes:

You can also use the Inventory Stock Management feature to limit sales to events or training classes where there is limited seating. For example, if you are selling seats in a seminar that has space for fifty people, you can set the Qty On Hand to 50 and also set the **Out Of Stock field** to **“Stop accepting orders when out of stock”**. When the item is out of stock or the person tries to purchase more seats than the number of seats remaining, the system will indicate that this item is OUT OF STOCK and will not allow the purchase. You could also host an event that had different seating sections with different prices AND different numbers of available seats for each section.

If NOT using Inventory Stock Management feature

If you are not going to use this feature for now, you can ignore this feature and the corresponding report. Just make sure you **do NOT set** the Out Of Stock drop-down field to **“Stop accepting orders when out of stock.”** in the product details screen for any product. If you have products that are at, or below, 0 inventory stock level, the system would then prevent your customer from purchasing them.

To use the Inventory Stock Management Feature

Inventory Stock levels are set for each product – and each variant of each product – in the Product Detail screen.

Procedure:

1. Your first step is to do an inventory count of each product you stock and sell through your DonorShops store.
2. Edit each product and use the Update Stock link to set the Qty On-Hand according to the inventory you did in the previous step.
 - IF you want to stop accepting orders for a particular product when the inventory reaches zero (0), then set the **Out Of Stock field** to **“Stop accepting orders when out of stock”**.
 - Otherwise, leave this field at its default value of **“Accept orders even when there is no stock”**
 - Save your changes

3. Run the Product Stock Levels report to confirm that you have correctly updated your inventory levels for all products. This report will show you the date of the last inventory update for each product, the inventory level set for that date, the number purchased since then and the number remaining in inventory (see Product Stock Levels report image below).

- Make any corrections/updates per previous step above.
4. Run the Product Stock Levels report regularly to help you anticipate restocking requirements.
5. When you receive additional stock:
- Run the Product Stock Levels report. Right click and choose 'Print' to print a copy of this report
 - Put aside any items where the Remaining column indicated that there is a backlog (where the Remaining number is less than zero)
 - Complete and ship those orders to your customers and mark the applicable orders using the checkbox beside the 'This Order is Complete' field in the order details screen of DonorShops.
 - Count up the remaining items you have left in the shipment you just received
 - Use the Update Stock field in the product detail screen to update the DonorShops Qty On Hand field to the actual value you have on hand. Save the change. The Product Stock Levels report will now show the new quantity on hand in the Qty column and will also show the new date in the Last Updated column.

Product Stock Levels

	Code	Name	Qty	Last Updated	Purchased	Remaining	Restock At
	C3204FF	Bandages & Gowns	0	Sep 28, 2011	8	-8	0
	A0B4AAC	Fish School (Saturday Only)	0	Oct 4, 2011	5	-5	0
	B8F852B	Make Waves	0	Sep 18, 2011	4	-4	0
	2C347D7	Whale Tail Poster	0	Sep 18, 2011	3	-3	0
	75DD755	Whale Stickers	0	Sep 18, 2011	3	-3	0
	1CE4FFD	Make a Donation	0	Sep 18, 2011	2	-2	0
	222430F	Tribute Donations	0	Sep 18, 2011	2	-2	0
	CF2F5B8	Membership: Recurring	0	Sep 18, 2011	1	-1	0
	A0B4AAC	Fish School (Sunday Only)	3	Sep 18, 2011	4	-1	0
	A0B4AAC	Fish School (Premier Pass to all events)	2	Sep 18, 2011	3	-1	0
	3A7CBCD	Whale Watching Cruise	0	Sep 18, 2011	0	0	0
	DED333B	Whale Hoodie (Medium)	5	Sep 18, 2011	5	0	0
	AA1DE70	Goal Oriented Fundraising	0	Sep 18, 2011	0	0	0
	694D4B3	Concert (Middle Row)	10	Oct 25, 2011	0	10	0
	B1CE9BB	Tasty Krill	21	Oct 26, 2011	0	21	0
	694D4B3	Concert (Front Row)	0	Oct 26, 2011	0	0	0
	DED333B	Whale Hoodie (Small)	10	Sep 18, 2011	6	4	0
	DED333B	Whale Hoodie (Large)	20	Sep 18, 2011	6	14	0
	694D4B3	Concert (Back Row)	50	Oct 26, 2011	2	48	0
	A0B4AAC	Fish School (Friday Only)	100	Sep 18, 2011	2	98	0

This image shows the screen improvement regarding the presentation of product variants:

Stock & Price

Name:	One Time \$100 Donation	Default:	☒
Reg. Price:	\$ 100	Sequence:	0
Sale Price:	\$ 0	Shipping:	No v
Quantity:	0 (Update)	Weight:	0 lbs

[Show Digital Download Options](#) [Delete](#)

Name:	One Time \$300 Donation	Default:	☐
Reg. Price:	\$ 300	Sequence:	0
Sale Price:	\$ 0	Shipping:	Yes v
Quantity:	0 (Update)	Weight:	0 lbs

[Show Digital Download Options](#) [Delete](#)

Product Stock Levels Report Filtering

Now you can filter your Product Stock Levels report to quickly find what you're looking for by selecting a Category and/or Project Area (or whatever your system calls the filter function) and then clicking on the filter button.

Category:	Classes	Project Area:	Any
Filter			

	Name	Code	Qty	Last Updated	Purchased	Remaining	Restock At
	Winter Camp (January 23 – 31)	C2E0499	15	Aug 1, 2012	0	15	0
	Winter Camp (March 12 – 19)	C2E0499	0	Aug 1, 2012	0	0	0
	Winter Camp (November 11 – 18)	C2E0499	15	Aug 1, 2012	0	15	0

Tax Definition

Feature Applies To: DonorShops PRO, UNLIMITED

Taxes are defined through the Tax Rules menu item. When you click on this, you will see a list of taxes that have already been defined for your system and also a button to add new taxes:

Tax Rules

 Add Tax			
	Code	Description	%
	AL Tax	4% Alabama Sales Tax	4
	AR Tax	6% Arkansas Sales Tax	6
	AZ Tax	5.6% Arizona Sales Tax	5.6
	CA Tax	8.25% California Sales Tax	8.25
	CO Tax	2.9% Colorado Sales Tax	2.9
	CT Tax	6% Connecticut Sales Tax	6
	DC Tax	6% District of Columbia Sales Tax	6
	FL Tax	6% Florida Sales Tax	6
	GA Tax	4% Georgia Sales Tax	4
	HI Tax	4% Hawaii Sales Tax	4
	HST	13% Harmonized Sales Tax	13
	IA Tax	6% Iowa Sales Tax	6
	ID Tax	6% Idaho Sales Tax	6
	IL Tax	6.25% Illinois Sales Tax	6.25
	IN Tax	7% Indiana Sales Tax	7
	KS Tax	5.3% Kansas Sales Tax	5.3

When you click on the edit icon (first column on the left), you will be able to edit all the parameters for the tax:

View/Edit Tax

Name:

Description:

Rate: %

State/Province(s):

Hold CTRL (Command on Mac) key to select multiple options.
[Select All](#) / [Select US Only](#) / [Select CA Only](#) / [Clear All](#)

City(s):

*Seperate each city name using a carriage return.
 This list is NOT case sensitive.*

Taxes are applied when the Shipping province/state for the order corresponds to a selected state/province in this window AND also the product screen has a checkbox checked for this state/province for this product.

Note the addition of the **City(s)** field. This allows you to specify an additional regional/municipal tax amount on top of the state/provincial tax. If you have created a city tax, DonorShops will also look at the value they entered in the City field of the Billing Address to determine whether the City tax should ALSO be applied to the purchase.

In this example, we already have a provincial Ontario tax specified as a separate tax entry. This municipal tax is added as a new tax and we have specified municipalities affected and also a common mis-spelling as well in the City(s): box above. You can list multiple items to account for

- Different possible spellings of the municipality name
- Different local municipalities that all fall under the regional/municipal tax area (in this example, Metcalfe, Osgoode and Greely all fall under this tax)

The following image shows part of the Product screen where you specify which taxes should apply to



this product. Notice that Alabama 4% tax and 13% Harmonized Sales Tax are both enabled (checked) for this product. If you have specified any city taxes, you will need to enable both the state/province tax and the relevant city tax for each applicable product.

Taxes:

[All](#) | [None](#)

- | | |
|--|---|
| ☒ 13% Harmonized Sales Tax | ☐ 6% Kentucky Sales Tax |
| ☒ 4% Alabama Sales Tax | ☐ 4% Louisiana Sales Tax |
| ☐ 5.6% Arizona Sales Tax | ☐ 5% Maine Sales Tax |
| ☐ 6% Arkansas Sales Tax | ☐ 6% Maryland Sales Tax |

Email Notifications

Feature Applies To: DonorShops LITE, PRO, UNLIMITED

This feature allows you to modify the content and BCC addresses of the emails that DonorShops sends to your customers:

Email Notifications

 [Add Email Notification](#)

	Name	Status
	Account: Password Reset	Online
	Account: Updated	Online
	Account: Welcome	Online
	Order Received: To Admin	Draft
	Order Received: To Customer	Online
	Saving Whales ConfeTicket	Online
	Sept 2013 Uganda Trip Volunteer Registration: Next Steps	Draft

Listing (7) Email Notification(s)

List of Email Notifications:

Name	Function
Account: Password Reset	Sent when an account holder resets their password
Account: Updated	Sent when the account holder makes any changes to their My Profile information
Account: Welcome	Sent when person uses Sign-Up to create an account
Order Received: To Customer	This is the standard order confirmation email. If you enter one or more BCC email addresses for this email, those email addresses will receive copies of every DonorShops order. If you want BCC email address for certain products, enter the desired email address(es) in the Email Notify field in the desired product(s). If you want an additional product specific email with different content sent, create a separate Email Notification and link it to the desired product. (like the eTicket example on the next page of this user manual).
Order Received: To Admin	Use this if you want an order confirmation with different content sent to your organization when an order is received.

OTHER PRODUCT SPECIFIC EMAILS	
e.g.; Saving Whales Conference eTicket e.g.; Sept 2013 Uganda.... Etc....	This is just an example an additional Email Notificaiton email created by an organization. These are always linked to a single product and allow you to do things like, as in this example, sending an eTicket to people who register for this event. These are also ideal for situations where you are registering volunteers and you need to send them information on what to do next to prepare for the activity.

View/Edit Email Notification

View/Edit Email Notification

Name:

Status:

Product:

To:

Subject:

Cc:
Must be a comma seperated list.

Bcc:
Must be a comma seperated list.

B *I* U ABC A

Paragraph



[[first_name]] - Thank you for your gift to SavingWhales

LETTER: Order Received: To Customer

Purchase Date: [[order_date]]

Thank you very much for your support. It is through the generosity of people like you that we are able to continue our work. Your support truly makes a difference!

Email Notification Variables

When you are editing the content of your Email Notifications, you can insert values into them such as

the person's name/address information, the number of items purchased and the name of the product variant they selected using Email Notification **merge tags**. The list of available merge tags is shown in the **merge tag cheat sheet** which you can access at the bottom of the email content window:

Click to access the [merge tag cheat-sheet](#).

This is an example of how you can set up a custom Email Notification that can be used as an eTicket.

DonorShops eTicket Services

Event Registration eTicket: Saving Whales Conference Registration

Name: Maya Angeloux

3240 Billing Ave, Winston-Salem, NC

Number of tickets purchased: **1**

Registration Type: **Monday Only**

Ticket ID number: C0F749587A



Event Date: **May 10, 2013**

Event Time: **06:00 p.m.**

Event Location: **123 Main St., Fargo, ND**

Dress: **Smart Casual**

PLEASE PRINT THIS eTICKET AND PRESENT IT AT THE DOOR ON YOUR ARRIVAL

This is the Product Detail window for this Email Notification:

Tips & Tricks

Notice that this email also includes a QR Code (barcode) that can be automatically generated by DonorShops.

You can include a simple event checkin QR code with the **[[checkin_qr]]** tag...

OR...

If you want to include a fully customized QR code, you can use this syntax:

In case you don't have a QR code reader handy. The actual code generated for this particular ticket is:

Saving Whales Conference Registration, Maya Angeloux, Ticket Quantity: 1,
Order No.:C0F749587A

To generate a QR code in your Email Notification that includes the event name, persons name, qty purchased and DonorShops order number, simply

- Open up the HTML window for the email 
- past this code into the desired location in your email:

```

```

To Resend Email Notifications: In the order details screen, there is a 'Renotify Customer' link that

causes DonorShops to resend any email notifications, including standard order notification emails, to the customer.

Basically, you can insert any of the merge codes and/or other text into your QR code like this

```

```

These QR barcodes can be read by common scanner applications that run on smartphones, so you could scan their tickets at the door to get a list of people who attended the event. In fact, even if they forgot to print the ticket, as long as they have the email on their smartphone, you could scan the QR barcode from the email!

Custom Fields in Email Notifications

You can also include Custom Field data in your email. For example, if you had a Custom Field in your product for Participant Names in case the person paying is registering for other people; you could include that Custom Field in your eTicket (or other Email Notification) by including one or more of the [[custom_field_xx]] tags where xx is the sequence number of the desired Custom Field.

In this example (below), you would use [[custom_field_01]] to get the Participant Names, [[custom_field_02]] to get the number of vegetarian meals or [[custom_field_03]] to get their seating request. **Tip: if it doesn't work the first time, double check the sequence numbers you gave to each custom field in the product.**

Custom Fields

#	Type	Label	Required	Map to UDF
1	Big Text	Participant Names	Required	Participant Names
2	Select Box	Number of vegetarian meals	Required	Vegetarian Meals QTY
3	Select Box	Seating request	Not Required	Seating Request

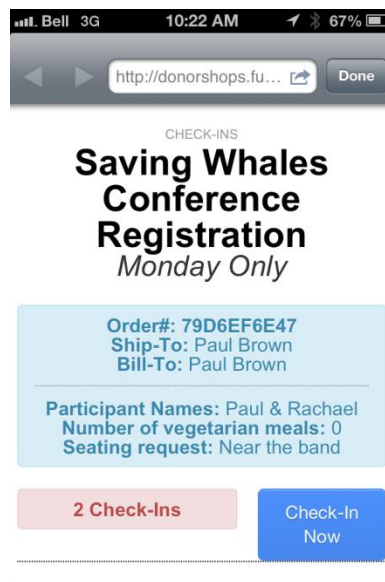
QR Code Event Attendance

DonorShops allows you to automatically generate a Check-In QR code into a custom email notification for an event.

DonorShops does NOT require a specific mobile phone scanning application. There are lots of free apps out there. Try a few out and find one you like!

This allows your event registration staff to:

- scan the eTicket at the gate with a mobile device
- view the number of people who have already checked in on this ticket
- check people in with the displayed 'Check In Now' button
- display any custom field options set for the ticket – e.g.; if the people requested a seat near the band, it will display on the QR Check-In page shown on the mobile device



And allows your desktop users via JPanel to:

- display the event-specific Event Check-Ins Report to see who has checked in

Check-Ins

☐		Code	Product	Variant	Ticket Count	Checked-In			First Check-In	Last Check-In
						Once	Multiple	Not Yet		
☐		156900C	Saving Whales Conference Registration	ALL ACCESS	2	0	0	2		
☐		156900C	Saving Whales Conference Registration	Tuesday Only	6	2	1	4	Sep 16, 2013 11:03am	Sep 17, 2013 7:51am
☐		156900C	Saving Whales Conference Registration	Monday Only	5	0	0	5		

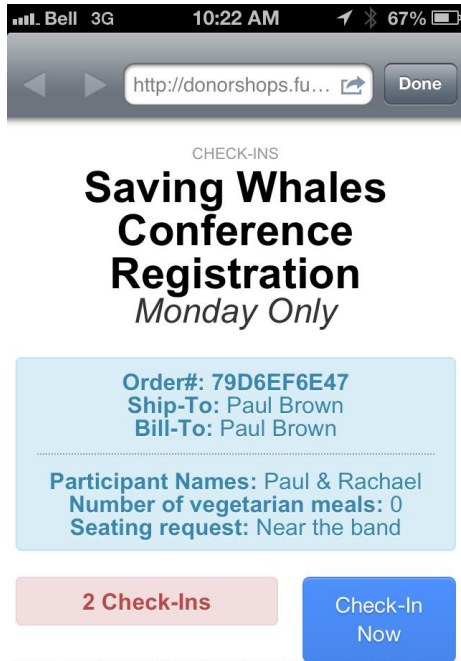
How To Set Up QR Code Event Attendance

- This feature must be enabled on your system and is included in both DonorShops PRO and DonorShops UNLIMITED configurations
- You MUST enable the '**Enable Event Check-Ins**' option within the event product(s).
- Add the **[[checkin_qr]]** merge tag to the Custom Email Notification for the event
 - **Remove** any other QR coding you may have already had in your custom email notification. You don't want registration staff to scan the wrong code.
- Create **JPanel** logins for your gate registration staff BUT ONLY ENABLE the '**Can process event Check-Ins**' option (unless you actually want them to have other JPanel access)
 - When they scan their first ticket, they will have to log into JPanel with these credentials and this will allow them to view the mobile device checkin display (shown on previous page) for subsequent ticket check-ins

Suggestion: You may also wish to create a Test Event on your DonorShops system with a sample QR code checkin eTicket so you can show your registration staff how to use this on their mobile devices before the doors open for your actual event. Once you have one eTicket for your test event, you can use (scan) it over and over again for training your staff.

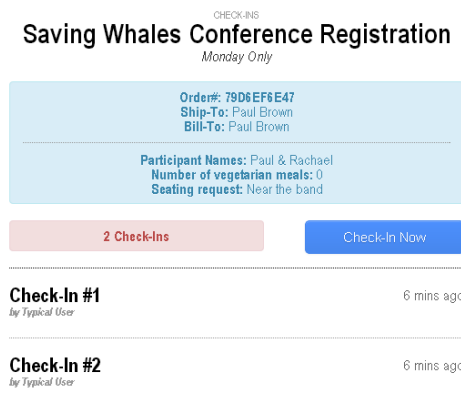
Screens

Mobile Phone



Note that the display automatically shows any Custom Field values – in this case, the participant names, the number of vegetarian meals requested and where they wanted to sit.

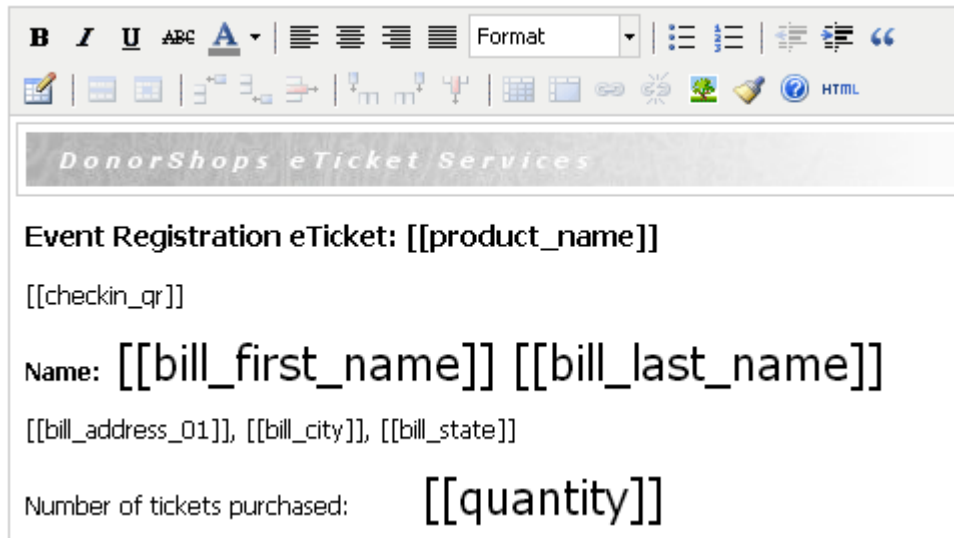
Here, the user has scrolled down a little on the page to see when the 2 Check-Ins occurred:



So, if somebody else comes in with a bogus BCC of the event registration email, when they get to the door, it will show that there were already 2 check-ins for this ticket six minutes ago.

Custom Email Notification

A Custom Email Notification showing the `[[checkin_qr]]` merge tag that actually generates the QR code within the email



Jpanel Users

Screenshot of the JPanel permission needed by your event registration staff. You can either create separate JPanel accounts for each registration staff or have them share one login. As mentioned above, we recommend you do NOT enable any other JPanel options for your registration staff JPanel users.

Permissions

- ☐ Can edit web pages
- ☐ Can add and remove pages
- ☐ Can contribute to feeds
- ☐ Can add and remove feeds
- ☐ Can manage E-Commerce
- ☐ Can edit site template (HTML/CSS/JS)
- ☐ Can manage admin
- ☐ Can access web statistics
- ☐ Can access email administration
- ☒ Can process event check-ins

Product

In the event product(s), you **MUST** enable the Event Check-Ins option:

 **Options:**

☒ Show product on website

☐ New product

☒ Featured product

☐ Clearance product

☐ Enable DPO Tributes

☐ Enable Social Buttons

☐ Enable Facebook Comments

☒ Enable Event Check-Ins

 [Duplicate This Product](#)

Report

Back in JPanel, you can see the Event Check-Ins Report.

First, the list of events and event variants:

Check-Ins

☐		Code	Product	Variant	Ticket Count	Checked-In			First Check-In	Last Check-In
						Once	Multiple	Not Yet		
☐		156900C	Saving Whales Conference Registration	ALL ACCESS	2	0	0	2		
☐		156900C	Saving Whales Conference Registration	Tuesday Only	6	2	1	4	Sep 16, 2013 11:03am	Sep 17, 2013 7:51am
☐		156900C	Saving Whales Conference Registration	Monday Only	5	0	0	5		

Then, the detailed attendance information for a particular Event/Variant Combination:

Check-Ins: Saving Whales Conference Registration (Tuesday Only)

☐		Order	Bill-To	Ship-To	Checked-In	Check-In Count	Last Check-In
☐		CC9EAAE97F	Edgar Mail	Edgar Mail	Yes	2	Sep 16, 2013 2:10pm
☐		F4F22EF21F	Maya Angeloux	Maya Angeloux	Yes	1	Sep 17, 2013 7:51am

Shipping

Feature Applies To: DonorShops PRO, UNLIMITED



Tiered Shipping

The Tiered Shipping feature of DonorShops Pro and Unlimited allows you to assign shipping charges to orders based on the value of items in the order that require shipping and the Shipping Option (e.g.; shipping method).

	Qty		Price	Total
		✕	\$20.00	\$20.00
	4	✕	\$30.00	\$120.00
	7	✕	\$7.50	\$52.50
Sub-Total:				\$192.50
Shipping: Express Post				\$14.95
Tax:				\$9.11
Total (USD):				\$216.56

When your site visitors get to the cart page to process their order, they will see a list of shipping options. In the above example, the shipping price being displayed is based on using the Express Post shipping option.

- The shipping price is only calculated on the items in their cart for products you indicated Requires Shipping:

**Requires
Shipping**



- The amount they pay depends on the Shipping Tiers defined and the value of the portion of their order that requires shipping:

Shipping

Add Shipping Option		Add Shipping Tier			
Name	Default	\$0.00 – \$99.99	\$100.00 – \$499.99	\$500.00 +	
 Express Post	No	\$9.95	\$14.95	\$38.65	
 Parcel Post	Yes	\$4.95	\$9.89	\$24.99	

In this example, there are three Shipping Tiers. You can have more tiers (or less) if you like:

- \$0.00 – \$99.99
- \$100.00 - \$499.99
- \$500.00 and higher

In this same example, shipping charges only apply to the second (\$120.00) and third (\$52.50) items in their cart, so shipping charges are calculated based on \$172.50. The first item in their cart did not have the Requires Shipping option set so no shipping is charged on this item. The \$172.50 places the order in the middle Shipping Tier ([\\$100 - \\$499.99](#))

	Qty		Price	Total
		✗	\$20.00	\$20.00
	4	✗	\$30.00	\$120.00
	7	✗	\$7.50	\$52.50
Sub-Total:				\$192.50
Shipping: Express Post				\$14.95
Tax:				\$9.11
Total (USD):				\$216.56

Because the site visitor currently has the Express Post option selected, a shipping charge of \$14.95 is added to the order. **FYI:** Tax calculations include the cost of shipping when calculating the amount of tax to be applied to the order.

To update an existing shipping tier, go to the Shipping Menu item where you will see the shipping menu:

Shipping

Add Shipping Option		Add Shipping Tier		
Name	Default	\$0.00 – \$99.99	\$100.00 – \$499.99	\$500.00 +
 Express Post	No	\$9.95	\$14.95	\$38.65
 Parcel Post	Yes	\$4.95	\$9.89	\$24.99

To update an existing Shipping Tier, just click on the link for the desired tier:

Add Shipping Option		Add Shipping Tier		
Name	Default	\$0.00 – \$99.99	\$100.00 – \$499.99	\$500.00 +
 Express Post	No	\$9.95	\$14.95	\$38.65
 Parcel Post	Yes	\$4.95	\$9.89	\$24.99

This will open up the View/Edit Shipping Tier screen where you can adjust the minimum and maximum value for the tier. Do not leave gaps between the tier values unless you do not want to charge shipping in the gap price ranges. For example, if you had a range from \$0.00 - \$99.99 and the next range was from \$200.00 - \$499.99, then any orders from \$100 to \$199.99 would not have shipping charges applied to them.

To set up your top shipping tier, specify the minimum value (\$500 in the example shown) and leave the Maximum Value set at \$0.00. This will tell DonorShops to charge this top tier shipping price for all orders \$500.00 or higher. Another way you might want to do this would be to set up your top tier from, say, \$500.00 - \$2000.00. Then if anybody is nice enough to place an order over \$2000.00, we will thank them for their generosity by not charging them anything for shipping.

View/Edit Shipping Tier

Minimum Value: \$

Maximum Value: \$

To create a new Shipping Tier, simply click the Add Shipping Tier link on the main shipping screen.

NOTE: We recommend you create your Shipping Tiers BEFORE filling in your Shipping Options. This will save you having to go back into each Shipping Option to fill in the prices for the new Shipping Tier.

Shipping Options

Once you have created your Shipping Tiers, you can update and add new Shipping Options.

View/Edit Shipping Option

Name:	Express Post
Description:	3 - 5 days
Is Default:	No - This is not the default Shipping Option

Tiered Pricing

\$0.00 - \$99.99:	\$	9.95
\$100.00 - \$499.99:	\$	14.95
\$500.00 +:	\$	38.65

[Save](#)[Delete](#)[Cancel](#)

Set the name of the shipping option (e.g.; Parcel Post, Express Post, etc.)

One of your shipping options (usually the least expensive one) should be set as the default shipping option using the 'Is Default' drop-down by setting the value to 'Yes - this is the default Shipping Option'.

Set the desired shipping price for each tier.

Courier Based Shipping

This feature is new for DonorShops. It provides shipping prices based on actual shipping charges from FedEx, UPS, USPS, Canada Post based on your organizations location, the purchaser's location and the ship-able product weight:

Shipping:



- ☐ FedEx International First at \$200.19
- ☐ FedEx International Priority at \$112.17
- ☐ FedEx International Economy at \$96.25
- ☒ FedEx Ground at \$18.62

(Total weight: 1.4lbs)

\$18.62

- IMPORTANT:** In the View/Edit Product screen, make sure you set a weight value of greater than 0 pounds for any items that require shipping otherwise shipping charges will not be added to the order

Shipping:	Yes
Weight:	2.2 lbs

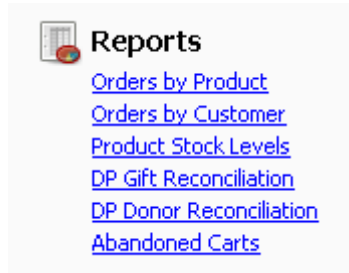
If your system is currently configured to use Tiered Shipping, but you would like to switch it to Courier Based Shipping, contact us at theteam@donorshops.com. Courier Based Shipping requires setup of accounts with your existing courier(s).

Currently Supported:

- FedEx
- USPS
- UPS
- Canada Post

Reports

DonorShops includes four reports:



Orders by Product Report:

Orders by Product

	Code	Name	Qty Purchased	Total Amount	First Purchase	Last Purchase
	AA5C104	2 Meals per Day	4	\$432.00	Oct 23, 2012	Nov 2, 2012
	4C2D767	Art Class For Kids	6	\$300.00	Sep 10, 2012	Oct 24, 2012
	1F0EAD0	Benefit Gala	8	\$800.00	Sep 6, 2012	Sep 6, 2012
	5D23D52	Concert Sunday June 27	13	\$585.00	Nov 2, 2011	Sep 4, 2012
	D5CC38E	Construction Costs	5	\$352.45	Oct 31, 2011	May 9, 2012
	59F44D2	Donation With Amount Choices	10	\$2,325.00	Nov 2, 2011	Mar 23, 2012
	AA1DE70	Goal Oriented Fundraising	1	\$50.00	Oct 18, 2011	Oct 18, 2011
	CF2F5B8	Gold Membership	23	\$2,300.00	Jun 20, 2011	Aug 27, 2012
	1CE4FFD	Make a Donation	4	\$50,243.00	Nov 30, 2011	Apr 17, 2012

This report shows a summary of purchases of each product item. When you click the edit icon, the system will show the individual purchasers of this item and any product variants selected (DonorShops PRO, UNLIMITED).

Product Orders Report

 [Export Selected](#)

☐		Order#	Order Date	Option	Qty	Custom Fields
☐		2F9ACAD812	Sep 10, 2012	Sept 29 @ 12:00 a.m.	2	Participant Name(s): Rhonda and Yonda Food Allergies: Brussel Sprouts Please tell us about any food allergies, special requests or other needs your child may have: My children are gifted... just wanted to make sure you know this and give them extra attention.
☐		C221B186A1	Oct 24, 2012	Sept 15 @ 11:00 a.m.	2	Participant Name(s): Timmy & Justine Food Allergies: yes - as indicated below Please tell us about any food allergies, special requests or other needs your child may have: Brussel sprouts and liver...
☐		E262CA1688	Oct 24, 2012	Sept 15 @ 11:00 a.m.	2	Participant Name(s): Bobby & Sally Food Allergies: yes - as indicated below Please tell us about any food allergies, special requests or other needs your child may have: Neither of them will eat liver

If you click the [Export Selected](#) link, DonorShops will export a CSV file containing all order fields for the selected item(s) including product variants and Custom Field values input by the purchaser (e.g.; student names, meal requirements, seating preference, etc.)

If you click the edit icon in this screen, the system will retrieve the order details page for the selected order.

Orders by Customer Report

This report shows a summary of total purchases by each customer:

Orders by Customer

	Customer	Donor ID	Last Order	Total Orders	Total Amount	Total Products	Total Quantity
	Ann Brentano	150	Jul 18, 2011	1	21.15	1	1
	Ann Brentano	151	Jul 18, 2011	1	42.29	1	2
	Billy Bee	162	Sep 27, 2011	1	1149.00	1	1
	Dave Duffus	237	Oct 24, 2012	1	221.50	2	3
	ddd da;lskdfj		Nov 30, 2011	1	56589.70	4	8
	Flying Crowe	208	May 10, 2012	4	803.55	14	19
	Jacob Dotsaur	6	Oct 11, 2012	1	50.00	1	1
	James Naismith	186	Nov 6, 2011	1	451.89	1	2

When you click the Edit icon, the system provides a detailed report on all purchases made by the **selected** customer. You can filter this list by date range and/or order status:

Orders

[Mark Selected as...](#)
[Export Selected](#)
[View Selected Packing Slips](#)

Status: Any
Created Date: to

Filter

☐	Order No.	Bill To	Items	Total (\$)	Created Date
☐	D61F3C3C9D	Maya Angelou	1	5.75	Nov 3, 2012 09:13:51
☐	EB702DE336	Maya Angelou	2	1900.00	Nov 2, 2012 16:22:51
☐	5E0EDB8F2A	Maya Angelou	4	3800.00	Nov 2, 2012 16:16:06
☐	FB8DDF60F3	Maya Angelou	5	126.47	Nov 2, 2012 16:01:36
☐	CAFD6AFB42	Maya Angelou	1	95.45	Nov 2, 2012 15:49:54
☐	1A959E7455	Maya Angelou	1	29.95	Oct 14, 2012 08:59:00

DP Gift Reconciliation Report

This report shows DonorPerfect GL Code, Solicitation Code, Sub-Solicitation Code and Campaign Code values for each Gift ID created in DonorPerfect that was a DonorShops purchase.

This can be especially useful in situations where DonorShops created multiple gifts for a customer purchase of multiple items. Remember that DonorShops will create multiple gifts for a customer purchase **ONLY** when there are different DP Code values that need to be preserved

Gift Reconciliation

	Ref#	Donor	Gift	GL	Solicit	Sub-Solicit	Campaign	Amount	Date
	1480226755	Rocky Balboa (161)	10599	ESTORE	WEB	NCS	REG	199.75	9/27/2011
	1480238587	Billy Bee (162)	10601	ESTORE			SPCWEB	1149	9/27/2011
	1477168950	Rocky Balboa (161)	10595					30	9/22/2011
	1477168950	Rocky Balboa (161)	10596	ESTORE	WEB	SOF01	CLASS	89.98	9/22/2011
	1477168950	Rocky Balboa (161)	10597	ESTORE	WEB	AP	SPCWEB	53.37	9/22/2011
	1477187202	Rocky Balboa (161)	10598	ESTORE	WEB	SOF01	CLASS	89.98	9/22/2011
	1475292897	Josh Bloomfield (159)	10592	ESTORE	WEB	SOF01	CLASS	129.95	9/19/2011
	1475298101	Chelsea Bloomfield (160)	10593					13	9/19/2011
	1475298101	Chelsea Bloomfield (160)	10594	ESTORE	WEB	SOF01	CLASS	129.95	9/19/2011
	1475137838	Josh Bloomfield (158)	10586	ESTORE	WEB	SOF01	CLASS	44.99	9/18/2011

DP Donor Reconciliation Report

The Donor Reconciliation report shows a summary of the number of gifts, the total given, the maximum amount given and the first gift date for each DonorShops customer on your site.

Donor Reconciliation

Donor	Gifts	Total Given	Max Given	First Gift Date
 Rocky Balboa (161)	5	463.08	199.75	9/22/2011
 Billy Bee (162)	1	1149	1149	9/27/2011
 Chelsea Bloomfield (160)	2	142.95	129.95	9/19/2011
 Josh Bloomfield (147)	2	37.74	19.95	6/19/2011

Product Stock Levels Report

The Product Stock Levels report shows your DonorShops product inventory levels:

Product Stock Levels

Category:
Project Area:

Filter

	Name	Code	Qty	Last Updated	Purchased	Remaining	Restock At
	Whale Stickers	75DD755	0	Oct 26, 2011	61	-61	0
	Whale Tail Poster	2C347D7	0	Sep 18, 2011	19	-19	0
	A New Product (xxx)	004623A	100	Sep 1, 2012	0	100	0
	A New Product (xxx)	004623A	1000	Sep 1, 2012	3	997	0
	A New Product	004623A	1000	Sep 1, 2012	0	1000	0
	A New Product	004623A	100	Sep 4, 2012	0	100	0
	An Elephants Life	3385305	1000	Sep 4, 2012	0	1000	0
	Bandages & Gowns (Variant Two)	C3204FF	0	Dec 23, 2011	0	0	0
	Bandages & Gowns (Variant One)	C3204FF	100	Dec 23, 2011	1	99	0

- Items that are out of stock will show in red text at the top of the report.
- The value in the Qty column is always based on the inventory level you manually set within the product variant
- The Remaining amount is the last set Inventory value minus the purchased quantity

Abandoned Carts Report

The Abandoned Carts report shows visits to your DonorShop where one or more items were placed in the cart, but the site visitor did not complete their purchase.

If the person left the site before filling in their name/address/email information in the Bill To fields, then the Abandoned Carts list report will show 'n/a' in the 'Bill To' column. If, on the other hand, they did complete these fields, then **this gives you the opportunity to contact the site visitor to offer assistance completing the order**

Abandoned Carts

Started Date: 2014-10-28 to 2014-11-27

Status: Checking Out ▾

Filter

	Bill To	Email	Items	Total (\$)	Response Text	Started Date
	Jacob Dotsaur, North York, ON, CA	jacob@dotsaur.com	1	606.58		Nov 26, 2014 11:59am
	Susan Phillips, Schenectady, NY, US	susan@savingwhales.com	7	814.48		Nov 13, 2014 12:50pm
	, CA	support@iccreative.ca	1	500.00		Oct 30, 2014 05:12pm

If you open up the Abandoned Carts order to view the order details, you will be able to see whatever name/address/email information they did fill in as well as the items they placed in their cart. (see *image next page*)

The Abandoned Carts report has been enhanced with the addition of the **Response Text** column. If the site visitor attempts to complete their transaction but the purchase fails, DonorShops now includes the Response Text returned from the payment processor. If the payment processor has not returned any Response Text, the field will remain blank. Two of the above entries demonstrate this. In the case of Bob Tester, he attempted to complete a second transaction with exactly the same purchase total within a time period specified by the payment processor (contact DonorPerfect for more information on this). In the second case, Bobby Botox attempted to complete a purchase using an invalid credit card number.

The Abandoned Carts report has also been enhanced with the ability to filter entries to view:

- Any entries
 - This gives you all entries
- Pre-Checkout only
 - Checkout page visited, but no attempt to check out. These show the Bill To: n/a entries
- Checking Out only
 - These are the entries with name/address info. Opening these up will show where clients failed to fill in fields or failed to fill them in properly
- Failed Payment entries
 - These entries show items where they got far enough that SafeSave tried to process the purchase but rejected it for some reason – e.g.; credit card declined. NOTE: As the Response Text field is new, older entries before this field was added will not show failure reason and you would have to get this info the old way – from your SafeSave portal

Order Details

Started At: Jul 12, 2012 15:24:19

Billing Information

First Name:

Last Name:

Email:

Address:

Address 2:

City:

State:

ZIP/PC:

Country:

Phone:

Shipping Information

First Name:

Last Name:

Email:

Address:

Address 2:

City:

State:

ZIP/PC:

Country:

Phone:

Items Ordered

Code	Name	Promo	Qty	Price	Total
4E35D34	Cervical Dystonia/Spasmodic Torticollis		12	0.00	0.00
627E804	A Guide for Caregivers of Adults		2	5.00	10.00
0CF7A99	Karen Rodriguez is Running the Space Coast Marathon (FL) (Awesome!) Post Message for Karen: Go Karen!		1	25.00	25.00
			Subtotal		35.00
			Taxes		0.00
			Total		35.00

Adding Pages To Your DonorShops Site

In addition to creating products in your DonorShops site, you can create a variety of pages, blogs and other media-rich content in your DonorShops site. It is this feature that makes it possible for DonorShops clients to use their DonorShops site as their main website!

NOTE: There is one system page in your DonorShops Site called 'Home'. This page is used to display your DonorShops site homepage. Do not make any changes to this page without checking with DonorShops first.

Adding and updating pages is done through the JPanel Administrative Interface: Content > Manage/Edit Pages

In this screen you will see a list of any existing pages and also a menu item at the top to **Add Page/Link**

DonorShops.com Add Web Page

Page Name:
The title of the page as it will be displayed on the page and in the menus.

Content Type:

☐ Website Navigation

Visibility:

Menu Placement:
The menu item this page belongs to in the menus.

Sequence:
The order in which this page will be displayed in the menus.

New Window:
Depending on the browser, this page may open in a new tab, not a new w

Menu Image: Currently: No file uploaded
 Upload: No file chosen
The image will be uploaded to http://dev.donorshops.com/images.

Page Name: Give the page a name. If you make the page 'visible in website navigation' this is the name that will appear as the menu item name

Content Type: Choose Normal Content for a page you are going to write content into
 Choose Menu Item Only if you are only going to use this as a link to an internal or external web page
 Choose Advanced Content if you are going to insert <IFRAME> content into the page. You can still have other normal html content in these pages as well.

Status: Online / Offline - you can keep pages offline until you are ready to publish them

Visibility: This option controls whether the page will show in the menu system. You could, for example, have a page that is online but Hidden in Website Navigation. This would allow you to access it if you sent the link to somebody, but it would not be accessible via navigation through the menu system.

- Menu Placement:** If you have DonorShops PRO or UNLIMITED, you can either place menu items as main menu links (Main Link) or have them under another menu item – you will see a list under this drop-down of your existing menu items.
If you have DonorShops LITE, select Main Link
- Sequence:** Menu items are sequenced from 1 up – left to right – higher numbered menu items appear to the right of lower numbered menu items
- New Window:** You can either open a menu item in the DonorShops window (recommended for pages that you create within DonorShops OR 'Open link in a new browser window' which is recommended for links to external websites
- Page URL:** Depending on the page type, it may auto-assign a page URL if not, then read the small grey text just below the box to see what you need to put in here.
- Layout:** Select 'Content' – if you do not do this, the page will show on a white background – select 'Content' to set the page within DonorShops

SEARCH ENGINE OPTIMIZATION:

- Browser Title:** This will appear in the browser window tab
- Meta Description:** Description used by search engines to index this page.
- Meta Keywords:** List of any keywords to further help search engines index this page.

- Previous Versions:** Allows you to return to a previously published version of this web page.

DonorShops Supporter Login

Applies To: DonorShops PRO and DonorShops UNLIMITED

Welcome, **Maya!** My Profile My History Logout

The DonorShops Login feature allows your site visitors to register for an account on your DonorShops system either when they are making a purchase or via a self-registration form.

DonorShops Login



Personal Information Security/Control

- Your organization controls activation status for each member account
- My Profile and My History information is only available to logged in users with a DPO Donor ID connection that is keyed to the email address stored in DPO for this DPO constituent
- Your organization controls whether Your DonorShops site will display My History and/or My Profile pages
- Your organization controls whether the My History page displays only DonorShops purchase history or also reports on the constituents giving history in your organizations DPO system.
- On a password reset request (Forgot my Password), the re-activation email is sent to the email address of the requesting party only if they already have a DonorShops Login account.
- Under no circumstances can your DonorShops Login account holders modify their giving history information (*other than indirectly by making additional purchases or donations*).

Login Link

The visibility of the Login link is controlled by a system Login page.

- **Use the Status Online / Offline drop down menu item for this page to control whether site visitors see the Login link.**

A common usage example is keeping the Login page Offline while you are setting up your membership and then switching it Online when you are ready for site visitors to log into your site.

This page includes the **[display_login_form]** code.

This page also includes a link to the Forgot Your Password page.

NOTE: Passwords are case sensitive. For example, if they entered 'jOhN' as their password, 'john' will not work.

Sign-Up Link

The visibility of the Sign Up link is controlled by a system Sign Up page.

- **Use the Status Online / Offline drop down menu item for this page to control whether site visitors see the Sign Up link.**

A common usage example is keeping the Sign Up page Offline while you are setting up your membership and then switching it Online when you are ready for site visitors to create DonorShops Login accounts on your site.

This page includes the **[signup_form]** code.

NOTE: Passwords are case sensitive. For example, if they entered 'jOhN' as their password, 'john' will not work.

General	Billing	Shipping
First Name: Last Name: Email: Password Password: Confirm:	Country: Canada Address: City: Province: Alberta Postal Code: Phone:	Same as Billing Country: Canada Only Address: City: Province: Alberta Postal Code: Phone:

My Profile Link

The My Profile member page allows the logged in member to review and update their personal information:

General	Billing	Shipping
First Name: Maya Last Name: Angelou Email: maya@angelou.com Password: Change Password	Country: United States Address: 3240 Valley Road City: Winston-Salem Province: NC Postal Code: 28106250 Phone: 205-555-1212	Same as Billing Country: United States Address: 3240 Valley Road City: Winston-Salem Province: NC Postal Code: 28106250 Phone: 205-555-1212

[Update Profile](#)

When a DonorShops account holder updates their profile, **the account holder will receive an email** indicating the change(s) they have made to their profile. You can also have DonorShops send you a 'BCC' of this email to notify you - as the organization using DonorShops - of the account holder profile change.

My History Link

The My History member page shows the logged in member their giving history:

- Includes a section showing DonorShops purchases/donations. This is controlled by the **[display_transaction_history]** shortcode.
- Includes section showing all DPO gifts (via DonorShops or not) if the member has a Donor ID number and is synched with DPO. This is controlled by the **[display_dp_transaction_history]** shortcode.
 - Note: This report includes only gifts with a Record Type value of 'G' (Gift) and intentionally exclude parent pledge entries ('P'), Main ('M'), Soft Credits ('S'), etc.

We encourage you to include phone and email information where your account holders can contact your organization if they have any questions.

My History

Shop History for Roger Sandstone

Date	Order Number	Items	Ship To	Amount
Oct 24, 2012	E262CA1688	5	1-275 William St, ON N6B 3C2	\$154.87

SavingWhales account records for Roger Sandstone

Date	Receipt Number	Amount	Fair Market Value	Net Donation
Oct 24, 2012		\$29.85	\$0.00	\$29.85
Oct 24, 2012		\$100.00	\$0.00	\$100.00
Oct 14, 2012	W2011-107	\$22.50	\$0.00	\$22.50
Oct 14, 2012	W2011-107	\$100.00	\$25.00	\$75.00

In the above example, two additional shortcodes are used. The line that shows “Shop History for Roger Sandstone” is set up in the My History system page (accessed via Content: Manage/Edit Pages) as:

Shop History for [member value='first_name'] [member value='last_name']

Account Creation

Cart: Create an Account

When the site visitor makes a purchase on a system that has membership running, they will see a Create an Account panel in their checkout cart under the credit card fields:

Create an Account

Choose a password to view your purchase history and update your profile.

Password:

Password Again:

Complete Purchase

Your credit card will be charged.

When your site visitor makes a purchase and enters a Create an Account password, an account registration email will be sent to the site visitor allowing them to log into your DonorShops site.

The Create an Account registration checks your DPO system to find out if the person already exists in your DPO database and creates a new DPO constituent if required. The Donor ID of the constituent is recorded in the DonorShops account.

We can also set up your system to send you a 'BCC' of this email so that you receive notification of account registrations.

Sign Up

The Sign Up page allows site visitors to create their own DonorShops Login without making a purchase

or donation.

When your site visitor registers for an account using the Sign Up screen,

- A system-wide setting in DonorShops controls whether DonorShops checks for or creates a new donor in your DPO system when people register for an account via the Sign-Up form .
- The default for this option is to check and create if required
- If you would like this setting changed for your DonorShops site, please contact theteam@donorshops.com.

When a site visitor registers for an account using the Sign Up screen, they gain the ability to log into your DonorShops site, to view and update their My Profile information and to view their giving history using the My History screen. It also means that when they login and make purchases, DonorShops will automatically retrieve the billing and shipping information stored in My Profile. Please note that they must always enter their credit card information for any new purchases.

Sign Up Today

General

First Name:

Last Name:

Email:

Password

Password:

Confirm:

Billing

Country:

Address:

City:

Province:

Postal Code:

Phone:

Shipping

[Same as Billing](#)

Country:

Address:

City:

Province:

Postal Code:

Phone:

Sign-Up

Getting Started with DonorShops Login

Step	Action	Notes
1	Email theteam@donorshops.com to let us know you would like this feature activated on your DonorShops site	When DonorShops Login has been activated, you will see new System Pages in your Manage/Edit Pages list for: Login, Forgot Your Password, My Profile, My History and Sign-Up
2	Make any desired updates to your System Pages	Example: • You can disable the Login and Sign-Up links by taking these system pages 'Offline' • If you don't want to allow your supporters to view their DPO gift history, you can disable this part of the My History page. • Consider adding your phone/email

		contact info to the Sign-Up and My History pages so they can reach you if they have any questions
5	Communicate with your supporters	Let them know.. • They can sign up via the Sign-Up link on the home page or by using the Remember Me link on the checkout cart page. • When they are logged in, the Shipping and Billing fields in the cart will be pre-filled for them and they only need to enter their credit card information to make a purchase • They can update their profile information and view their shop purchasing history (<i>and their DPO giving history if you are enabling this</i>).
6	Activate the Login and Sign-Up pages if you took them offline in step 2 above.	

DonorShops Membership

Applies To: DonorShops UNLIMITED

DonorShops Membership brings your organization and your supporters closer together. When a member logs into your DonorShops site, they land on a page that is specific to their membership category where you can tell them with text, images and video how much their support means to you and about how you want to honor their loyalty by giving them member discounts specific to their membership level. You could even give them links to product or event items that aren't listed publicly yet!

They can also review their current membership level and expiry date and upgrade or extend their membership through **DonorShops membership products** that are linked to specific membership levels.

DonorShops Membership



If the account holder logs in and they ALSO have a membership level,

- they can be automatically directed to a landing page that is specific to their membership level where you can do things like
 - displaying their membership expiry date,
 - offer them opportunities to renew or upgrade their membership
 - let them know about the discounts available to their membership level
 - direct them to pages and products that are not visible to the general public but ARE specific to their membership level.
- You can give members automatic promotional discounts

DonorShops Membership Setup Overview

Step	Action	Notes
1	Make sure your DonorShops login features are set up.	See previous section in this document.
2	Check and update your membership levels in your DPO system	Ensure your existing membership levels and settings for all your constituents (donors) are current and correct.
3	Set up promotional codes as required for each membership level in DonorShops	
4	Setup Membership landing pages in DonorShops	Can either be a shared landing page for all membership categories or one per category
5	Create Membership levels in DonorShops	These levels will normally correspond to your DPO membership levels. Remember that when you are creating matching levels in DonorShops, you must use the CODE value of the DPO membership level
6	Setup any membership products you will offer on your DonorShops site	.
7	Create any members-only products, categories and pages and then tag your membership level(s) with these items	If you have multiple membership levels, make sure you tag these items properly for each membership level.
8	Communicate with your supporters	Let them know.. • They will be able to sign up via the Sign-Up link on the home page or by using the Create an Account link on the checkout cart page. • When they are logged in, the Shipping and Billing fields in the cart will be pre-filled for them and they only need to enter their credit card information to make a purchase • They can update their profile information and view their shop purchasing history (<i>and their DPO giving history if you are enabling this</i>).
9	Activate the Login and Sign-Up pages if you took them offline in step 1 above.	
	If you want to create DonorShops Login accounts for your existing members, contact theteam@donorshops.com to request uploading of these	

Membership Configuration

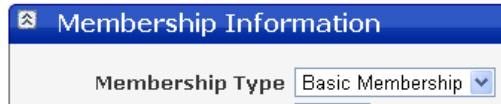
DonorShops gives you a choice on how you want to configure membership.

- Use DonorPerfect Online Membership Levels **OR...**
- Use DonorShops SHOP Membership Levels

If your DonorShops site is configured to use DonorPerfect Online Membership Levels, whenever a site visitor logs in using their DonorShops Login, DonorShops will check and update their membership level

from DPO.

DonorPerfect Membership Levels



You can use the membership functionality built into DonorPerfect Online (DPO) by creating DonorShops Member Levels that have a corresponding DonorPerfect Level. With this type of membership setup, you are responsible for setting up and maintaining correct membership levels within your DPO system.

There are some points you should be aware of regarding this type of setup:

- DPO provides Online Help that provides information on DPO membership setup
- The easiest way to do a global member level update in DPO is to create a DPO export template that includes at least the DONOR_ID and MCAT fields. Then update the MCAT levels in Excel (or equivalent spreadsheet program) and re-import them into DPO. For help on importing CSV files into DPO, see DPO Online help on 'Using the Import Module'.
- See also: DPO: Settings > Code Maintenance: Show Only: **Membership Type / Donor Screen** to modify the available membership levels within DPO
- Create membership levels in DonorShops to match any DPO membership levels you want to 'activate' in DonorShops. This is done via the DonorShops eCommerce > Membership menu item.
- When a Donor ID has been specified for a DonorShops Supporter Login account holder, DonorShops will pick up the current membership level from DPO for the DonorShops Supporter Login account holder each time they log in.
- When a site visitor purchases a membership level they already have (i.e.; renews their membership), DonorShops will extend their membership expiry date by the Duration (Days) value set for the membership category.
- When a site visitor purchases a membership level they do not currently hold (e.g.; a new membership or change in membership level), the new membership level will be effective immediately and the expiry date will be set to **today's date** plus the Duration (Days) value.

DonorShops SHOP Membership Levels

You can create DonorShops SHOP membership levels that are independent of (and ignore) the membership levels in DPO. **This is only available if your DonorShops site is NOT configured to synchronize memberships with DPO**

Membership Administration

Membership Levels

Use this screen to create and edit membership levels.

Membership Levels

 [Add Membership](#)

	Sequence	Code	DP ID	Members
	4	Basic DPO Members	BASIC	4
	1	Bronze DPO Members	BRONZE	4
	6	Elite SHOP Members		0
	3	Gold DPO Members	GOLD	1
	99	non members	NM	5
	5	Platinum DPO Members	PLAT	1
	2	Silver DPO Members	SILVER	1

Listing (7) membership levels.

Selecting an existing membership level or clicking on Add Membership takes you to the View/Edit Membership Level screen:

View/Edit Membership Level

Sequence:

Name:

Description:

This membership level exists in DPO with
 code = BASIC
 descr = Basic Member

Apply Promo:

Default Page (Url):

Duration (Days):

The rest of the screen is shown below and highlights your ability to control access to pages, categories and products for each membership level.

Notes:

- If you check the box for a page, product or category, it will no longer be visible to site visitors unless they are logged in with the selected membership level
- Making a Category members-only, stops the category from showing, but any public products can still be found in the Search bar or if a person knows the direct link.
- To stop people from being able to search for a product or arriving there via a link, check the product name as well.
- If someone tries to access a members-only page, product or category without logging in, they will be automatically redirected to the Login page.

- You can assign membership durations of up to 9999 days to allow for long-term recurring memberships. E.g.; 9131 days is 25 years.
- If you have marked a page, product or category as members-only for one membership category, you would need to select the same checkbox for any other membership categories who should be able to see this page, product or category. **A marked product/page/category item will only be visible/searchable to the membership category or categories that have a Secure Content checkbox selected.**

Secure Content

Pages:

[All](#) / [None](#)

☒	Bucket List
☐	Elite SHOP Member Landing Page
☐	Platinum Member Login Landing Page
☐	Gold Member Login Landing Page
☐	Silver Member Login Landing Page
☐	Bronze Member Login Landing Page
☒	Basic Member Login Landing Page
☐	About DonorShops

Categories:

[All](#) / [None](#)

☒	Members Only Section
☐	Feed the Whale's
☐	Books
☐	Posters & /Stuff
☐	Membership
☐	MRW New Cat
☐	Pledges
☐	MRW Categories

Products:

[All](#) / [None](#)

☒	An Elephants Life 3385305
☒	Bandages & Gowns ü ñ ó ú C3204FF
☐	Become a BRONZE Member C1B62AFC1
☐	Become a GOLD Member C1B62AFC2
☐	Become an ELITE Member C1B62AF
☐	BRONZE Membership: Recurring CF2F5B8
☐	Dogs4Dystonia Sponsor a Dog 3A1C364
☐	Donation with Variants C2CAD57

DonorPerfect Integration

DonorPerfect Level:

BASIC

Use this screen to

- enter the membership level name,

- connect it to a promotional code discount level that will be automatically applied whenever the logged in member makes purchases
- specify a landing page for this membership level
- specify the duration of the membership
- link this membership level to a membership level that exists **in your DPO system** by inserting one of the **CODE** values from your **DPO Settings > Code Maintenance > Membership Levels / Donor Screen** into the DonorPerfect Level field in your DonorShops View/Edit Membership Level screen:

Show only Membership Type / Donor Screen Go Export to Excel

☐ Hide Inactive Codes

Share code with - NO FIELD SHARED - ?

☐ Reciprocal Relationship? Save

Add

	Field Name	Code	Description
Edit	MCAT	BASIC	Basic Membership
Edit	MCAT	BRONZE	Bronze Member
Edit	MCAT	GOLD	Gold Member
Edit	MCAT	NM	Non Member
Edit	MCAT	PLAT	Platinum Member
Edit	MCAT	SILVER	Silver Member

To link a DonorShops membership category to the corresponding DPO membership category, use the DPO CODE value

Apply Promo

This is where you reference one of your DonorShops promotional discount levels that is to be associated with a membership level

Membership Landing Pages

When you set up your membership levels, you can specify a landing page for each membership level. When the user logs in, they will be taken to this landing page where you can tell them how much you appreciate their support and tell them about what you are doing right now as an organization because of the help they are providing and also tell them about any special discounts they can receive. This page is also where you can put in links to members-only products that don't appear in any product categories yet – so they could, for example, register for an event before the general public sees the event registration item.

To set this up:

- Create a DonorShops page that is online but where the Visibility is 'Hidden in website navigation' for each membership level. Add your content to this page. Also, see Special Membership Codes below if you want to have the page welcome them personally and tell them their membership level and expiry date.
- use the Default Page (URL) field that appears in the View/Edit Membership Level screen and

paste in the appropriate membership landing page URL for each membership level.

Default Page (Url): `/elite-shop-member-landing-page.php`

The logged in user can return to their membership landing page at any time by clicking on the **Welcome {Name}** link.

Here is a sample landing page showing Special Membership Codes to make the page personal to the logged in member:

This is the Silver Member Login Landing Page.

Welcome [member value="first_name"] [member value='last_name']!

We value our [member value='membership_name']. Your ongoing support helps us to save more whales.

[member value='membership_name'] receive the following promotional discounts:

15 percent off on all Books

15 percent off on all Posters & Stuff

15 percent discount on all Theatre events

Your membership_expires_on: [member value='membership_expires_on']

Members Only News!

[display_feed name='Members Only Blog']

You can also create other pages that are members-only. If they are listed in your page menu structure, the corresponding menu items will only be visible when a member with a membership category that has access to the page is logged in. You can also create direct links in your member landing pages to other members-only pages by just putting links or linked images into your member landing pages.

Products that Sell Membership

To create a product that sells a membership level, select the appropriate membership level in the Membership field within the Stock & Price section of the product.

Stock & Price

Name:	Couples Membership	Default:	☐
Reg. Price:	\$ 175	Sequence:	0
Sale Price:	\$ 0	Shipping:	No
Quantity:	0 (Update)	Weight:	0 lbs
Membership:	Bronze DPO Members		
Delete			

Name:	Family Membership	Default:	☐
Reg. Price:	\$ 300	Sequence:	0
Sale Price:	\$ 0	Shipping:	No
Quantity:	0 (Update)	Weight:	0 lbs
Membership:	Bronze DPO Members		
Delete			

Membership Duration

If you decide to sell membership levels as recurring gifts (Payment Type: Recurring Payment) in DonorShops, we recommend you set up the corresponding membership levels in DonorShops to have very long expiry dates - .e.g; 25 years. If you decide to sell membership levels as non-recurring (Payment Type: Add to Cart), set the membership duration to a standard value – e.g.; 365 days – and set your product 'Add to Label' to 'Membership Year(s)'. The reason for this is that in the non-recurring scenario, DonorShops will multiply the membership duration by the number of membership items purchased so that your site visitor can, say, purchase 3 years of membership and DonorShops would set the expiry date to 365 x 3 days from the purchase date.

Remember that if they are renewing an existing membership, the membership expiry date will be set based on the current expiry date of their existing membership. If they are changing their membership level or purchasing a membership for the first time, the membership expiry date will be set based on today's date.

Membership Cancellation

Membership expiry is checked every time the member logs in. If their membership has expired, they will still be able to log in but will no longer go to their previous member landing page and will not be eligible for any member discounts.

If you want to cancel somebody's membership, adjust their membership level and/or expiry date in your DPO system. You might do this if, for example, membership payments were being processed via a

recurring membership and the member had stopped paying.

Special Membership Codes

You can insert these codes into pages. The typical application would be to use one or more of these in membership landing pages:

Here are some examples you could past into your member landing pages. Note: The codes are the parts you see in [square brackets]. The rest is just explanation.

User Related:

Welcome [member value="first_name"] [member value='last_name'] !

Your email: [member value='email']

Your membership_expires_on: [member value='membership_expires_on']

Available Codes:

Code	Notes
[member value="first_name"]	
[member value="last_name"]	
[member value="membership_name"]	The name of the membership category they belong to
[member value="email"]	
[member value="ship_first_name"]	
[member value="ship_last_name"]	
[member value="ship_address_01"]	
[member value="ship_address_02"]	
[member value="ship_city"]	
[member value="ship_state"]	
[member value="ship_country"]	
[member value="ship_zip"]	
[member value="ship_phone"]	
[member value="bill_first_name"]	
[member value="bill_last_name"]	
[member value="bill_address_01"]	
[member value="bill_address_02"]	
[member value="bill_city"]	
[member value="bill_state"]	
[member value="bill_country"]	
[member value="bill_zip"]	
[member value="bill_phone"]	
[member value="created_at"]	Date when their membership was created in DonorShops

[member value="membership_expires_on"]	Date when their membership expires based on creation date (above) and duration
--	--

System Pages

Under Content : **Manage/Edit Pages**, you will see a category of pages called System Pages. These are pages that

- have special functions – e.g.; the My Profile page contains a special code called **[display_profile_form]** that causes the member information display/update fields to be displayed.
- Please be careful when editing system pages so you don't accidentally delete special functions.
- Cannot be deleted

System Pages

-  [Home](http://donorshops.funkjedi.com) http://donorshops.funkjedi.com,
-  [Login](http://donorshops.funkjedi.com/) http://donorshops.funkjedi.com/
-  [Forgot Your Password](http://donors) http://donors
-  [My Profile](http://donorshops.funkjedi) http://donorshops.funkjedi.
-  [My History](http://donorshops.funkjedi) http://donorshops.funkjedi
-  [Sign-Up](http://donorshops.funkjedi.co) http://donorshops.funkjedi.co

The System Pages that relate to membership are: **Login, Forgot Your Password, My Profile, Sign-Up and My History**. You can add content into these pages such as the Special Membership Codes, additional text explanations, images and video.

Home

Please do not edit this page or take it offline.

Membership Codes

You may wish to add in Membership Codes to show their membership level and expiry as well as contact information they can use if they have any questions or need any help.

My SavingWhales Profile

My current membership level: Basic DPO Member
My current membership expires on: 2014-10-14 00:00:00

Membership
Codes

If you have any questions or concerns about your Profile information or your membership status, please don't hesitate to contact SavingWhales Member Services at:

Text and images
entered by your
organization

1-xxx-nnx-xxxx



Use this Membership Profile Form to view and update your personal information in the SavingWhales database.

General

First Name:
Last Name:
Email:
Password: [Change Password](#)

[display_profile_form]
code

Billing

Country:
Address:

City:
Province:
Postal Code:
Phone:

Shipping

[Same as Billing](#)
Country:
Address:

City:
Province:
Postal Code:
Phone:

Update Profile

Available Codes:

[member value="first_name"]
[member value="membership_name"]
[member value="email"]
[member value="ship_first_name"]
[member value="ship_last_name"]
[member value="ship_email"]
[member value="ship_address_01"]
[member value="ship_address_02"]
[member value="ship_state"]
[member value="ship_zip"]
[member value="ship_country"]
[member value="ship_phone"]
[member value="bill_first_name"]
[member value="bill_last_name"]
[member value="bill_email"]
[member value="bill_address_01"]
[member value="bill_address_02"]
[member value="bill_state"]
[member value="bill_zip"]
[member value="bill_country"]
[member value="bill_phone"]
[member value="created_at"]
[member value="membership_expires_on"]

Site Customization

Feeds

You can use a feed to allow you add a blog to your site, list video content or audio files. There are examples of Blog and Video Content feeds in <http://demo.donorshops.com>

To create a feed for a blog, audio feed or video feed all involve the same process:

Create the Feed:

- Under Feeds, click Add Feed
- Select either Blog, Audio Feed or Videos
- Give the feed a Name that doesn't use any special characters (e.g.; avoid &, / , etc.). Make careful note of the name and copy it into a text editor such as Notepad so you can insert this exact feed name later. In our example, the Feed name is **Hammy Hamster Videos**
- Put in a copyright notice if desired.
- If this is going to be a Podcast feed, you will need to click 'More Options' and fill in the additional fields. There is a help link here to give you more information on how to fill in Podcast fields.
- Save the feed.

Create the Page where you will view the feed:

1. Create a Page and set the type to Normal HTML. You can leave the page offline for now. Enter your feed name (we called ours by the same name as the feed name: Hammy Hamster Videos.
2. Now, enter the displayFeed link in the main editing window in exactly this format. In this example, the feed name is **Hammy Hamster Blog**. You would substitute the name of your feed.

[display_feed name='Hammy Hamster Blog']

- Notice the square brackets at the beginning and end []
 - Notice the single space between display_feed and 'name'
 - Notice the single quotes at the beginning and end of the feed title.
3. You can place other text above or below this displayFeed link
 4. Set the page status to Online
 5. Save your page

Add Posts to your Feed:

1. Select the feed under the Feeds menu item and use Add Post to add your blog/audio/video feed items.
- If you are entering video feed items, click on the HTML menu item at the top of the Body field and paste the <iframe> embed code from the video and paste it in.

You should now see a new menu item at the top of your DonorShops site the the feed name. When you click on it, you should see the feed and the post you just created.

Menu Items:

When you define a Content Type as a Menu Item, it will allow you to link this menu item to a web page as shown below. To see all the options visible below, you need to click on the More Options link.

View/Edit Web Page

Page Name:
The title of the page as it will be displayed on the page and in the menus.

Content Type: ▼

Status: ▼

Website Navigation

Visibility: ▼

Menu Placement: ▼
The menu item this page belongs to in the menus.

Sequence:
The order in which this page will be displayed in the menus.

Link to Page:
Leave this blank unless you want this menu item to link to an existing page.

New Window: ▼
Depending on the browser, this page may open in a new tab, not a new window.

Menu Image: Currently: No file uploaded
Upload:
The image will be uploaded to http://icdi.donorshops.com/images.

Buckets

Under the Site Design menu in JPanel, you may see a menu item called 'Buckets'. A Bucket is a container of text or HTML code that you can reference from multiple places on your DonorShops site. The benefit is that if something changes in the content, you only need to update it in one place.

- If Buckets are disabled on your DonorShops system, you will not see this menu item.
- Buckets cannot contain other shortcodes
- Buckets can be used in Layouts and Pages but not in Products

Potential uses of this could be a bucket for your charity registration status information or one for organization's contact information.

Once you have created one or more buckets, you can invoke the specified bucket with this code:

Example: A bucket called **Contact Info**:

Buckets

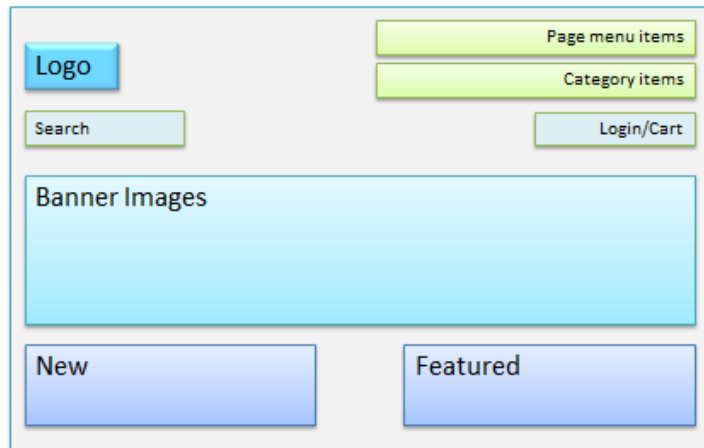


Could be made to appear on pages, in Layouts or within product Page Content fields by using this code:

```
[bucket name='Contact Info' ]
```

Shop Theme Setup

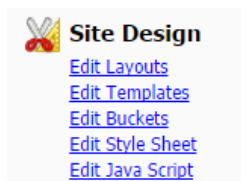
DonorShops.com will set up the color scheme and fonts of your DonorShops.com eCommerce platform on initial setup. This includes the customization of the color scheme and fonts used in your DonorShops site and makes use of our standard DonorShops theme layout:



Examples of Standard Themed Sites: <http://demo.donorshops.com/examples.php>

If you have web development expertise available to your organization and would prefer to have our theming person coach your web developer instead of theming your site, please let us know. You are welcome to use the Site Design Tools available through your DonorShops JPanel menu. These are discussed in the following section.

Site Design Tools:



The layout of your DonorShops.com eCommerce platform screens can be modified from the standard layout. These functions require web site coding proficiency and are accessed through the Site Design menu items.

If you are not an experienced web developer, do NOT make any changes to Site Design parameters. Repairs to Layouts, Templates, Buckets, Style Sheets or Java Script is a chargeable site design service.



IMPORTANT: Before you make any modifications to the Style Sheet or any of the layouts, copy the contents of the style sheet and each layout and save these in a file on your computer so you can go back to the originals if necessary.

Style Sheet

The style sheet should only be modified by web developers who have a clear understanding of CSS style sheets.

Tip: To remove the search filter from the category list pages, modify the line in the style sheet that begins with

```
.c .filter
```

Add the style attribute: `display: none;`

NOTE: DonorShops cannot be responsible for repair or maintenance of style sheets that have been modified by the client. Any work to repair or restore style sheets that have been modified by the client organization or their representatives will be performed at the current DonorShops Creative Services rate.

Customize your Goal Widget

If you are a web developer and want to modify the look of the goal oriented widget for your DonorShops client, pasted these lines into the bottom of the DonorShops style sheet (after saving a copy of the unmodified style sheet) and then modify as required:

```
/* goal */

.goal_wrap { border:0px; width:550px; height:45px; display:block;
margin:20px auto; position:relative; }

.goal_wrap .goal_bar { position:absolute; top:0px; left:50px;
width:450px; height:20px; display:block; box-shadow:1px 1px 3px #333;
-webkit-box-shadow:1px 1px 3px #333; -moz-box-shadow:1px 1px 3px #333;
}

.goal_wrap .goal_bar_bg { position:relative; top:0px; height:20px;
left:0px; width:100%; background:#a8a8a8
url('//code.donorshops.com/bg_highlight.png') repeat-x center center;
display:block; }

.goal_wrap .goal_bar_progress { position:relative; top:-20px;
height:20px; left:0px; width:0%; background:#035203
url('//code.donorshops.com/bg_shadow.png') repeat-x center center;
display:block; }

.goal_wrap .goal_label { position:absolute; top:27px; left:50px;
margin-left:-20px; text-align:center; font-size:10px; color:#666; }

.goal_wrap .goal_label.goal_label_0 { left:50px; }
.goal_wrap .goal_label.goal_label_20 { left:140px; }
.goal_wrap .goal_label.goal_label_40 { left:230px; }
.goal_wrap .goal_label.goal_label_60 { left:320px; }
.goal_wrap .goal_label.goal_label_80 { left:410px; }
.goal_wrap .goal_label.goal_label_100 { left:500px; color:#000; font-
weight:bold; }

.goal_wrap .goal_label_progress { text-align:right; text-shadow:-1px -
1px 0px #000; color:#fff; font-weight:bold; position:absolute;
top:2px; margin-left:-124px; width:120px; }

.goal_wrap .goal_label_progress.outside { text-align:left; color:#c00;
margin-left:4px; }

.goal_wrap.loading .goal_label_progress { color:#999; text-shadow:1px
1px 0px #fff; font-weight:normal; }

.productfields-required-asterix { font-weight:bold; color:#f00; }
```

Layouts

The default Layout sheets for DonorShops sites are:

- Splash: This is the front page of your DonorShops site
- Content: Any pages you build into your site
- eCommerce Pages: Category lists and individual product pages

Layout sheets control the appearance of header and footer information displayed on each of these pages. The header controls everything down to the top of the large white background area displaying category/product/page information. The footer element controls everything that follows this area. The behavior of the white background area in the middle of the page is controlled by the DonorShops engine and is not currently adjustable via Layout sheets with the exception of items specifically mentioned within the Style sheet (e.g.; the filter example shown above).

Shortcodes

Shortcodes are active elements within layouts that are controlled by the DonorShops engine and are accessed via code values contained within square brackets. They invoke pre-built DonorShops functions.

For example, the following code appears in the Splash layout:

```
<div class="sMenu">
  <!--<ul class="jc-ddMenu">[list_pages]</ul>-->
</div>
<div class="mMenu">
  <ul class="jc-ddMenu">
    [list_categories]
    <li class="highlight"><a href="/products/featured">Featured</a></li>
    <li class="highlight"><a href="/products/new">New Arrivals</a></li>

  </ul>
```

- The [list_pages] shortcode tells DonorShops to show the top level page menu items that appear on the homepage
- The [list_categories] shortcode tells DonorShops to display the top level category names on the homepage
- Contact theteam@donorshops.com to get a full list of available shortcodes

Security

Your customer's credit card information has the same high level of security and protection as all your DonorPerfect EFT information as it is processed by exactly the same SafeSave Gateway and payment processor system.

Your DonorShops.com site is protected by Comodo POSITIVE SSL site security which includes Microsoft Authenticode technology and Comodo's 2048 bit Code Signing Certificate.



Also, your site information is automatically backed up by DonorShops.com on a daily basis and are stored both as local backups at DonorShops.com and also at the LIGHTWAVE DATA CENTER in San Diego, California.

Advanced Settings

This page is only available to JPanel users with the **Can Manage Admin** permission option checked.

WARNING: Changes made to this page can affect the operation of your DonorShops site. Do NOT make any changes without first printing a copy of the unmodified values (right-click and select 'Print' in your web browser).

Field	Notes
Organization Name	This is your FULL organization name. It is referenced throughout the system in email merge codes and shortcodes.
Organization Name (Short)	This is the abbreviated version of your organization name. It is also referenced in email merge codes and short codes.
Default Page Title	Page titles show as page name – default page title; e.g; “Support Us – SavingWhales ”
Site URL	The URL of your DonorShops site. If you have a custom domain or subdomain set up for your DonorShops site, put the full URL of the custom domain/subdomain.
Custom Domain Migration Mode	Set this to Enabled if you want to be able to access your DonorShops site via the actual location (____.donorshops.com) as well as the custom domain/subdomain
Google Analytics ID	You may enter a Google Analytics ID number if you would like to track traffic on your DonorShops site. E.g.; 'UA-xxxxxxx-y'
Facebook Admin ID	Instructions on how to determine your FB Admin ID are on the DonorShops support site. Search on 'facebook' and look for the article titled 'How to: Determine my Facebook Admin ID'
Twitter Account Name	Enter your twitter account name. Do NOT include the '@' symbol
Cart Label	
Province/State	Sets whether the word that is displayed in the cart for the province/state field.
Product Filter Label	Sets the label assigned for the filter dropdown that is displayed when viewing a category of products. E.g.; Filter, Author, Project Area, etc. Also controls the label assigned to the filter field within each product.
Category Images	Enables/disables category images
Default Country	Controls the default country value displayed in the cart
Force Country	Normally blank, but you can set a country code here if you only want to allow orders from one country (e.g.; US, CA, AU, etc.) Full list of countries can be found in DPO > Settings > Code Maintenance > Country / Donor Screen. Use the CODE value, not the Description value.
Recurring Payment Day of	Select the date(s) in any month that you want to allow people to

Month Options	choose for monthly recurring pledges
Recurring Payment Day of Week Options	Select the day(s) of the week that you want to allow people to select for weekly or bi-weekly recurring pledge payments
Min Days to First Recurring Payment	This value is used for monthly pledge payment start date calculations. DonorShops will take an immediate pledge payment when the person completes their order, but the calculation of when the NEXT pledge payment start date will be adjusted so that it does not happen within the number of days you specify here.
Show 'Create an Account'	Controls whether the 'Create an Account' fields show up in the cart.
eComm: Order Fulfillment	Allows you to define the packing slip header that is used when you generate DonorShops Packing Slips from orders received.
SafeSave Username, SafeSave Password	WARNING: The SafeSave username and password values must be correct for DonorShops to process financial transactions. We recommend using a username and password that is secure. Example.; User: r4k56imgbaab003ajf8mn34k5h Pwd: 4mjlo689dnk4l6j6jmt4ll6n45itmr4 ... not these actual values, but something nobody is going to guess at.
Card's Accepted	WARNING: Do not enable payment methods unless you have confirmed that your SafeSave gateway and payment processor will accept the card type. For example, you have to complete a separate application form through your SofterWare account representative to allow you to accept payments via American Express. Do not add American Express in this field unless you have actually done that - otherwise your site visitors will get their AMEX cards rejected.
DPO Username, DPO Password	WARNING: The DPO username and password values must be correct for DonorShops to communicate with your DPO system. If you have changed the password for the DPO account that DonorShops is using to communicate with DPO, this is where you update the password. We recommend using a username and password that is secure. Example.; User: r4k56imgbaab003ajf8mn34k5h Pwd: 4mjlo689dnk4l6j6jmt4ll6n45itmr4 ... not these actual values, but something nobody is going to guess at.
Currency	Enter the currency code value corresponding to your default currency. E.g.; USD, CAD
Sync Memberships	If your DonorShops site is set up for membership functionality (DonorShops UNLIMITED), then this should be set to YES to allow DonorShops to retrieve the logged in account holders current membership level.
Allow Account Users to Update DPO Profile	Set this field to yes if you want your supporters 'My Profile' updates to change their donor information in DPO.
Use NOCALC Field	If set to Yes, the JPanel product detail screens will show an additional 'NoCalc' field which defaults to 'N' (or blank) but can be set on a per-product basis to 'Y'. If this value is set to 'Y' for a product, then when

	the product is ordered, the DPO NOCALC gift field will be set to 'Y' for the gift. This field causes the gift to be <u>excluded</u> from DPO calculations. Contact DonorPerfect support for more specific information on the effect of setting the DPO NOCALC field to 'Y' on DPO gift calculations.
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Site Check

This test will check and confirm your site settings, connections and email notifications are set up properly:

Step	Notes
Place a \$5.00 (or higher) order via your DonorShops site	You will need to use a legitimate name, address and credit card for this. Your order should include an email address that you can access. In previous versions, a \$1.00 purchase would suffice, but DonorPerfect has increased the default minimum acceptable purchase amount to \$5.00 for security reasons. This provides better security for your organization against foreign hackers who try to test credit cards by running \$1.00 purchases. If you want the default changed back in DonorPerfect, contact DonorPerfect support.
Confirm that the order appears in your DonorShops JPanel Orders list	If the order was unsuccessful, check your Advanced Settings SafeSave Username and Password. These must be correct for an active SafeSave account on your DPO system. You can access and update your SafeSave user/password information through the DPO SafeSave payment user interface. Contact your DonorPerfect support representative if you need assistance with this.
Open the order and note the DonorPerfect Donor ID and Gift ID(s).	You can click on these links to retrieve the order information directly from DPO on the order details page within DonorShops. If the Donor ID and Gift ID are showing as zero with a 'Resynch to DonorPerfect' link, this indicates that there is a problem with your DPO Login Username/Password. Double check your DPO login credentials by logging into your DPO user interface with the same credentials. If you can't log into DPO with these credentials, you will need to fix them in DPO and then update your DonorShops DPO Login information in the Advanced Settings DPO Username and/or DPO Password fields.
Confirm that you received the Order Received: To Customer email	See JPanel Email Notifications page for listing of the various emails.
If you had entered email address(es) in the Email Notify field for the product you purchased, you should have also received a 'BCC' of the customer email at this address (or these addresses)	The Email Notify field is in the DonorShops product
If you specified an Order Received: To Admin email address, you should have also received an order notification email at that address	See JPanel Email Notifications page for listing of the various emails.
If you ordered an item that includes downloadable content, the purchaser should have also received	See JPanel Email Notifications page for listing of the various emails.

the Order: eDownload Links email	
Note the confirmation number in the DonorShops order. This shows in the Confirm No. <i>From Payment Gateway</i> field.	
Log into DPO and go to App Links: Processing Gateway	
In the SafeSave payments window, select Reports	
In the Search Transactions area (lower portion of reports screen), paste the Confirm No. into the Transaction ID field	You should see the transaction in the resulting report.
This completes initial testing.	You have now confirmed that orders are processed properly by the SafeSave gateway and sent to your DPO system. Also, that the customer and your organization are receiving appropriate email notifications.

Support

Your primary support resources are:

- **The DonorShops Service Request Portal accessed by clicking on the Help link in your DonorShops JPanel menu**
- This User Manual
- You can also contact theteam@donorshops.com with non-support related inquiries



Our top priority is customer service and experience. We always do our best to ensure every client has what they need to be successful with DonorShops.

The DonorShops team is committed to making sure your DonorShops site functions as described in your DonorShops User Manual. DonorShops provides support for this Core Functionality at no charge on a 24 x 7 basis via the DonorShops Service Request Portal.

Please note that Core Functionality support does not include the setup, administration or updating of site specific content (e.g.; banners, products, categories, etc.) as the setup and administration of site specific content is the responsibility of the client.

If your organization would like additional training, coaching or help with site specific content, we are happy to provide this type of assistance via the premium service options available through the DonorShops Service Request Portal.

The DonorShops Service Request Portal can also be accessed via this link:

<http://support.donorshops.com>

Please Note:

We are doing our best to make sure that support requests are handled as quickly and efficiently as possible. An important part of this is having all support requests submitted via the DonorShops Service Request Portal.

Emails sent to theteam@donorshops.com will be treated as general enquiries. Emails to other staff email addresses will be treated personal emails, not as support requests.



The setup, administration and updating of site specific content is considered to be training. In other words, training is the explanation and/or demonstration of functionality described in this User Manual. If an organization would like assistance because they are unfamiliar with how DonorShops works, we are happy to offer training related services through the DonorShops Service Request Portal.